SUDAN

Economic impacts and emerging trends in West and Central Darfur

ACAPS ANALYSIS HUB SUDAN

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CRISIS OVERVIEW

Key drivers of the economic crisis in West and Central Darfur include market fragmentation, the militarisation of key trade routes, a liquidity crisis, and conflict-induced displacement. The result has been the near-total collapse of formal trade systems, spiralling inflation, livelihood losses, and eroded purchasing power (UN 20/04/2025; UNICEF 10/10/2023; Radio Tamazuj 12/06/2024).

Triggers differ between the two regions. West Darfur experiences severe violence and displacement, while Central Darfur faces prolonged economic instability, which has systematically undermined its trade and agriculture, leaving farmers unable to move, produce, or access cash.

The outbreak of the full-scale conflict between the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF) in April 2023 was the main impetus for the cascading economic effects in both states (ACLED 01/12/2023; CFR accessed 23/07/2025). Shifts in control over key economic and administrative hubs in Darfur, specifically Zalingei in Central Darfur and Ardamatta in Al Geneina, West Darfur, in late 2023 represented a critical inflection point with multisectoral implications, including reinforcing the war economy, trade obstructions, and an aggravated humanitarian crisis. This signalled a profound shift in regional power, creating immediate and compounding economic collapse as the majority of Darfur fell under RSF control (ACLED 01/12/2023; Dabanga 31/10/2023; OHCHR 17/11/2023). These historically marginalised states, already fragile from years of cyclical violence between local militias and various armed groups, became epicentres of economic collapse and humanitarian emergency (MD 12/05/2024; SPARC 14/04/2025 a).

The conflict has been severe on the Darfur economy. The violence in West Darfur has led to the mass displacement of tens of thousands and the deaths of an estimated 10,000–15,000 civilians. The complete disruption of urban markets and resulting depletion of the labour force has generated the economic fallout of Al Geneina (UNSC 15/01/2024; MSF 08/07/2024; HRW 09/05/2024; Concern 19/12/2024). Simultaneously, continuous clashes in Zalingei, Central Darfur, have crippled formal trade, agriculture, and mobility by strategically choking off critical trade routes, further devastating the regional economy (UNHCR 10/10/2023; ACJPS 08/01/2025; IFPRI 08/2023). Together, these collapses reveal the bifurcated but interlinked nature of Darfur's economic breakdown, with urban commerce collapsing in West Darfur and agrarian production collapsing in Central Darfur, each reinforcing one another.

Market systems in towns such as Zalingei and Al Geneina have either shut down entirely or currently operate intermittently and under extreme insecurity. They face constant threats from looting by various armed groups including RSF, direct attacks on traders, and the destruction of key infrastructure, such as physical markets, roads, and bridges (CGTN YouTube 29/05/2025; Dabanga 01/11/2023; SPARC 14/04/2025 a). The geographic position of these states was once a driver of commercial resilience through cross-border trade with Chad and the Central African Republic (CAR), as well as livestock herding and agricultural production supported by traditional trading networks and local markets. This, however, made them flashpoints for competition among armed groups, who controlled community members' mobility and extracted rents through checkpoints and informal taxes as they fought over economic resources (SPARC 14/04/2025 b). This forced taxation, including checkpoint fees and taxation on goods, has translated directly into reduced household purchasing power and food insecurity.

The inability to transport goods owing to insecurity has also disrupted food and fuel flows, increasing reliance on smuggling and informal markets for essential goods such as fuel, food, and medicine in both West and Central Darfur. Currently, the movement of goods is tightly controlled or altogether restricted in key routes, including Zalingei–Nyala and Tawila–Al Fasher, in turn increasing transport costs (SPARC 14/04/2025 a).

Coping mechanisms for the poor have shifted towards bartering, communal kitchens, or relying entirely on aid where available (EST 24/03/2025; Darfur24 18/05/2024). Previously, households would cope through seasonal labour migration, remittance pooling, and livestock sales. The breakdown of these networks has left many, especially rural and women-headed households, with no safety nets. Even previously functional urban economies have become fragmented or entirely dependent on localised trade flows, such as those between Zalingei and nearby villages (Radio Tamazuj 11/03/2024 and 12/06/2024). These markets are plagued by hyperinflation as the Sudanese pound continues to decline. Inflation has soared, with the prices of essential goods increasing by up to 200% in some areas, and the exchange rate has depreciated while rising significantly in the black market, bringing down household purchasing power (Radio Tamazuj 11/03/2024; Darfur24 01/07/2024).

The near-total breakdown of formal trade systems refers to the collapse of both intra-Darfur and cross-border commercial systems. Located along critical trade routes linking Sudan to Chad and CAR, these regions are also emerging as hubs for a conflict-driven economy that includes the smuggling of fuel, livestock, and weapons; illicit taxation; and survival economies

–factors that underwrite armed governance (FEWS NET 05/09/2024, 01/02/2024, and 06/2024; ACJPS 18/12/2023). Understanding how these dynamics affect livelihoods and vulnerability is essential for an effective humanitarian and development response.

This briefing note details the state of markets in West and Central Darfur amid continued conflict. It highlights the functional and physical collapse of the formal banking system and subsequent liquidity shortages, forcing reliance on expensive informal transfer systems such as the hawala system. It also outlines the entrenchment of the war economy fuelled by the illicit trade of commodities such as gold and gum arabic, as well as widespread extortion and informal taxation on key trade routes. Finally, it analyses the impact on livelihoods through massive job losses and the disruption of vital trade routes, leading to hyperinflation and a severe erosion of household purchasing power.

ABOUT THIS REPORT

Aim

This analysis focuses on West and Central Darfur as the dynamics of economic collapse are more acute and severe in these states than in other parts of the region (FEWS NET 05/09/2024, 01/02/2024, and 06/2024). The report fills a critical gap by providing a targeted and in-depth examination of the specific economic impacts in these areas, including the near-total breakdown of formal intra-Darfur and cross-border commercial systems. The analysis aims to inform humanitarian responders, donors, and operational planners about current economic conditions and anticipated future trends in the economic landscape of both states. The report targets food security and livelihood responders, cash and market working groups, protection specialists, and strategic planners seeking to adapt the humanitarian response to real-time economic conditions.

Scope and limitations

This analysis focuses on West and Central Darfur during the period of April 2023 to September 2025. While the primary emphasis is on economic disruptions directly linked to the conflict, it also accounts for the intersection with broader macroeconomic shocks, such as currency devaluation, examining how these are linked and diverge with local economic mechanisms. Thematic coverage includes market functionality, livelihood disruption, gendered economic impacts, informal taxation, coping strategies, and humanitarian access.

Limitations include:

- restricted primary data collection owing to insecurity and communication blackouts leading to findings skewing urban
- heavy reliance on secondary data that varies in recency and geographic coverage, with particularly limited visibility into remote, rural, and RSF-controlled areas
- limited visibility into informal and illicit economic activity.

Methodology

The analysis draws on the secondary data review of a wide range of humanitarian and research sources, supplemented by a limited number of remote key informant interviews (KIIs) with traders and humanitarian responders. As KIIs may present inherent biases, such as a focus on urban areas, they were triangulated with secondary data to cross-verify findings and identify key trends and gaps, such as increasing reliance on smuggling and challenges in accessing goods and services.

PRE-CONFLICT ECONOMIC LANDSCAPE IN WEST AND CENTRAL DARFUR

Before the full-scale conflict escalated in April 2023 between SAF and RSF, the economies of West and Central Darfur largely relied on subsistence agriculture, livestock rearing, and informal cross-border trade with Chad and CAR. These activities were the most significant sources of income, with the agri-food system alone accounting for one-third of the local economy. Local markets in towns such as Al Geneina, Mukjar, and Zalingei served as regional trade hubs, also facilitating cross-border exchange thanks to their strategic location on key routes. They facilitated the movement of food commodities, livestock, textiles, and manufactured goods (FEWS NET 12/2021 and 04/2023; UNICEF 09/05/2022).

Livelihoods in these regions were tied to seasonal agriculture, including the cultivation of millet, groundnuts, sorghum, and sesame that served as both staple foods and cash crops for generating marketable surplus. The trading of livestock, particularly camels and cattle, was a key pillar of the rural economy for a large proportion of households, with a mix of formal and informal trade routes connecting to markets in Chad and Al Fasher (IFPRI 08/2023).

A variety of safety nets underpinned these economies: seasonal labour migration (both internal and to neighbouring countries), remittances from migrants and the diaspora, and informal savings groups, particularly among women. These mechanisms provided critical support during shocks such as recurrent droughts and past periods of conflict. Women-led vending groups, for example, often operated on a localised household level and were critical for community-based credit sharing (FEWS NET 12/2021 and 04/2023; UNICEF 09/05/2022; KII 01/08/2025; UN accessed 22/07/2025).

While these networks demonstrated local resilience, they were ultimately fragile given high economic volatility and unable to withstand the scale of the 2023 conflict escalation. Even prior to the war, both West and Central Darfur were already structurally marginalised, characterised by chronic poverty and widespread food insecurity, with a significant portion of the population facing Crisis (IPC Phase 3) food insecurity or worse. They also suffered from weak infrastructure and exclusion from national development planning, resulting in a long history of underinvestment in roads, irrigation, and schools. The legacy of the Janjaweed conflict had already eroded household resilience through continued displacement, insecurity, and livelihood disruptions (WFP 08/12/2021; HRW 22/06/2022; IPC 05/2021 and 21/06/2022). This foundation of fragility has accelerated livelihood collapse since the 2023 conflict escalation (IFPRI 08/2023).

Table 1. Key pre-conflict market centres

MARKET CENTER	ECONOMIC ROLE	KEY COMMODITIES	CROSS-BORDER LINKS
Al Geneina	Regional hub for cross-border trade	Livestock, millet, imports from Chad	Chad (Adré)
Mukjar	Seasonal agriculture and livestock trading zone	Groundnuts, sesame, livestock	Internal trade to Central Sudan
Zalingei	Key transit centre for internal trade	Cereals, sorghum, household goods	Nyala–Al Fasher

ECONOMIC IMPACTS OF THE CONFLICT IN WEST AND CENTRAL DARFUR

Impact on financial services, banking access, and cash liquidity

The conflict has led to a physical and functional collapse of the formal banking system in Darfur, leading to liquidity loss. The suspension of banking services and looting of bank branches have severely affected the financial infrastructure (Radio Tamazuj 22/11/2023). In areas such as Golo in Central Darfur, where physical banks were already nonexistent, the consequences are particularly acute, forcing even greater reliance on informal money transfer systems and further constraining access to humanitarian cash transfers (KII 01/08/2025).

Liquidity shortages among domestic traders in West and Central Darfur have severely constrained market functionality and reduced household purchasing power. Cash scarcity limits traders' ability to restock goods, while hawala transfer fees ranging from 20–30% further drive-up costs. Consequently, markets are less functional, prices rise, and households have reduced access to essential commodities. Larger traders are coping better, leveraging cross-border networks and access to foreign currency, whereas small-scale traders dependent on daily sales struggle to sustain their businesses. These liquidity challenges are not seasonal but a direct, pre-existing, and escalating consequence of the conflict (KII 02/10/2025).

In West Darfur, particularly in Al Geneina, residents face an acute liquidity crisis, with transfer commissions such as hawala fees rising to as high as 20–30% of the transaction value (Dabanga 22/09/2024 and 04/09/2024). With many households and traders relying on remittances, the crisis has created a vicious cycle wherein they pay steep fees simply to access cash for basic needs but then also rely on remittances to pay for the fees. Soaring commodity prices worsen the situation, with sugar selling for between SDG 3,000-4,000 per pound (approximately $5-6), further straining households already battling economic shocks.

These financial hardships are directly linked to the suspension of formal banking services in RSF-controlled areas. Banks in Al Geneina and across much of West Darfur have ceased operations in response to insecurity, RSF interference, and the absence of central bank authority, leaving mobile money platforms such as Bankak the only available option. As with hawala, these platforms function at a prohibitive cost, aggravating market instability and weakening household purchasing power (Dabanga 22/09/2024 and 04/09/2024; CGAP 03/12/2024). These mobile platforms are also limited to people with access to their bank accounts in major towns and key trade routes where mobile connectivity is available, albeit intermittently (SPARC 21/08/2025).

Central Darfur faces similar challenges. In Zalingei, cash shortages are a prominent issue, leading to the emergence of a souq el gurush or "market of money" – a network of informal money changers who convert digital funds into scarce physical cash for steep commission. Urban consumers and traders can also use mobile banking applications such as Bankak, but as in West Darfur, they come with high commission rates (up to 10%) (SPARC 14/04/2025 a). Factors including constant network disruptions, displacement from urban centres where services are concentrated, and nonfunctional formal banking institutions also severely limit civilian access to these services (African Arguments 29/08/2023; NRC 28/04/2024; MSF 17/05/2024; KII 01/08/2025). Most rural communities are resigned to the hawala system and in-kind transactions (KII 02/10/2025).

Besides unequal access, humanitarian responders' reliance on direct cash distribution also means mobile banking is not widely applicable in West and Central Darfur. Prior to the current conflict, no multipurpose cash assistance interventions were implemented in these states, making it difficult to establish a precrisis baseline for commission rates (KII 02/10/2025).

Key informants highlighted that telecom disruptions are widespread across Darfur, further making both communication and banking unreliable. While a few wealthy traders can afford satellite internet services such as Starlink, business is mostly conducted in cash, as commissions on formal services are prohibitively high (KII 01/08/2025). Evidently, there is an emerging digital class divide.

At the household level, these interruptions limit access to mobile cash transfers, reduce communication with social networks, and restrict access to market and protection information. This has increased isolation, reduced purchasing power, and heightened vulnerability, especially among displaced and remote populations. The high costs of and security risks associated with using Starlink services at public stations particularly affect women-headed households and IDPs (KII 02/10/2025). Exclusion from information systems prevents women-led households from accessing and using digital financial services and forces them to rely on costly informal cash markets, compounding their poverty and vulnerability to economic shocks.

At the market level, poor connectivity disrupts trader coordination with suppliers and transporters, leading to restocking delays and inflated commodity prices. In response, humanitarian stakeholders employ community focal points and leaders to disseminate key information where mobile networks are down. To mitigate the exclusion of women, organisations are increasingly engaging women-led community networks and safe spaces as gender-sensitive communication channels, although such efforts remain limited in scale and coverage (KII 02/10/2025).

In West Darfur's border markets, the Central African franc has become the predominant currency (followed by the Sudanese pound and occasionally the US dollar), used for most cross-border trade flows such as the exchange of livestock and cereals particularly given the RSF checkpoint policy. This shift is a direct consequence of the Sudanese pound's collapse in value and the scarcity of exports, which has led to a lack of demand for the Sudanese pound and a local preference for hoarding foreign currency (SPARC 14/04/2025 a). The Sudanese pound has fallen to a record low against the US dollar, with the official bank rate falling to SDG 2,400 per USD 1 by late July 2025 and the parallel market rate reaching SDG 3,345 – a significant jump from SDG 2,600 at the start of the month (ST 24/07/2025). By September 2025, the official exchange rate stood at approximately SDG 2,040 per USD 1, compared to around SDG 2,800 per USD 1 on the parallel black market – a disparity of roughly 37% (KII 02/10/2025).

The Central African Franc has also appreciated sharply against the Sudanese pound on the black market – more than sevenfold from SDG 3,800 (approximately $6.64) at the start of the war to SDG 27,000 (approximately $45) in August 2025 (KII 01/08/2025). This rapid appreciation means that many households earning in Sudanese pound can no longer afford essential goods imported from Chad, priced in Central African franc. This has made rural areas more dependent on the informal and exploitative transfer channels discussed above.

The rampant, almost daily, inflation, with vast and rapidly fluctuating disparities between the official and black-market exchange rates, reflects deep economic instability and poses significant challenges for financial planning and market predictability (KII 02/10/2025). The collapse is fuelling soaring prices for basic goods, affecting aid value and local wage equivalence, creating a deeper hunger crisis, and placing a severe economic burden on families whose livelihoods have been devastated by the conflict. The fluctuating rates are also complicating humanitarian budgeting, procurement, and equitable aid distribution, further straining the operational environment.

The currency swap applies only to areas under SAF control and is not relevant to West and Central Darfur, where old Sudanese banknotes continue to be accepted for transactions (KII 02/10/2025). In RSF-controlled areas, the new Sudanese banknotes are physically prohibited at checkpoints and markets, forcing reliance on old banknotes or the Central African franc (Dabanga 30/12/2024; KII 01/08/2025).

The widespread looting of bank branches and the suspension of banking services have also fostered an environment conducive to illicit financial activities, such as money laundering and the financing of armed groups. To cope with lost access to savings and formal financial services, some people rely on the Bank of Khartoum inbox service, a workaround that allows them to receive money from family abroad to a mobile device. Network gaps, however, largely prevent access for rural populations (KII 01/08/2025). As a coping mechanism, some individuals and traders have resorted to travelling to Chad to open Chadian bank accounts, enabling them to receive international transactions. While people from Central Darfur also travel to Egypt, the UAE and Uganda, those from West Darfur mainly travel to Chad. That said, this is merely an expansion of pre-existing remittance patterns aggravated by the current crisis. These individuals often act as informal money couriers, receiving transfers on behalf of others. This involves risky cross-border journeys given banditry and extortion at checkpoints, posing significant protection concerns. For their services, these couriers charge a substantial commission of sometimes up to 25%. This fee is comparable to the exorbitant rates for formal transfers, which highlights the scale of financial exploitation, worsening household cash erosion (Radio Tamazuj 22/11/2023; Dabanga 30/12/2024; KII 01/08/2025).

In response, humanitarian organisations are exploring alternative cash delivery mechanisms, including digital platforms such as Aidonic and LMT, which are blockchain-based and built to provide an unchangeable and transparent record of transactions. This is comparative to Bankak, which is built on the traditional banking system's infrastructure. While these systems are currently being piloted in South and North Darfur, plans are underway to expand their use to West and Central Darfur. The shift towards such platforms reflects an urgent need to improve reliability, transparency, and efficiency in cash transfers amid growing liquidity constraints (KII 02/10/2025).

Entrenchment of the war economy

The illicit trade in gold and gum arabic has become the financial backbone of Sudan's conflict, funding military operations by both SAF and RSF. By the end of 2024, RSF controlled the most important production areas of gum arabic and a significant portion of gold trade (TriplePundit 27/10/2025; ADDO 29/05/2025). Overall, both groups have intensified efforts to exploit the country's natural resources, with external entities such as warlords from Egypt and the United Arab Emirates (UAE) profiting from the conflict (Chatham House 26/03/2025; MEMO 31/10/2025). A substantial portion of this illicit wealth is ultimately traded in the UAE, facilitated by front companies such as the Al Junaid Company owned by RSF and an extensive network of middlemen (Chatham House 26/03/2025; Democracy Now! 28/01/2025; ACCORD 01/07/2025; AJ 11/07/2023). About 48% of Sudan's gold is bypassing legal channels (ADDO 29/05/2025).

Between January–June 2024, an estimated USD 14.6 million worth of gum arabic was looted, affecting producers in areas including West and Central Darfur through financial losses, displacement, forced involvement in illicit trade networks (for instance, the product can only be marketed by traders who pay a fee to RSF), and a loss of market legitimacy when prospective buyers reject uncertified product (VOA 04/03/2025).

Before the conflict, Sudan's gum arabic production was stable, with the country typically exporting between 120,000–150,000 tonnes annually. A significant decline began in 2021, when production dropped to just 88,000 tonnes, generating roughly USD 110 million in revenue. The situation worsened from 2022–2023, with production stabilising at a much lower 60,000 tonnes owing to severe disruptions including insecurity, transport challenges, and looting. Despite this sharp drop in volume, prices for gum arabic skyrocketed. 2024 saw a modest recovery when production rebounded to an estimated 70,000 tonnes – a change tied to consolidated control by armed group security and efforts to maintain key export routes (Dayoub 21/08/2025).

RSF's systematic expansion from controlling a single commodity to forcefully dominating and taxing the cross-border smuggling of diverse strategic goods, including gum arabic, illustrates the establishment of a self-sustaining and maturing war economy. This extends beyond domestic looting, anchoring itself in transnational illicit trade routes for food, fuel, and arms that move through Chad and Libya. This cross-border dimension creates a self-sustaining revenue system, where the smuggling of goods, stolen vehicles, and hashish not only fuels the conflict but also reduces RSF's reliance on extracting resources from Sudanese civilians (ENACT 17/12/2024; IFPRI 08/2023). Despite these obstacles, there is currently no documented or anecdotal evidence of the forced recruitment of community members, including minors, into mining, charcoal production, or other exploitative labour practices in West and Central Darfur. Similarly, there is no direct evidence linking such practices to specific armed groups or control zones (KII 02/10/2025). This may be attributed to a lack of reporting access.

Traders report facing checkpoint extortion, looting, and arbitrary taxation, often in foreign currency such as the US dollar and Central African franc, which links to the broader narrative of currency substitution. Markets in Darfur, which were once regional lifeline, have instead become contested with violence, where rival parties compete for control over mobility and economic flows (IFPRI 08/2023).

Respondents indicated that traders are still required to pay a range of fees, such as zakat, waste collection charges, and security fees for market guards. RSF relies heavily on a system of informal road tolls and protection fees levied on commodities travelling the main trade routes. In urban areas and markets, they control and impose significant market taxation. Local militias capitalise on the lack of state security through extortion, looting, and ransom

via arbitrary checkpoint fees, including on trade and essential goods. At the same time, respondents emphasised that customs duties are no longer systematically enforced, highlighting a shift from state-controlled taxation to fragmented, informal levies. The end of customs duties does not necessarily mean cheaper imports, as these flows are largely disrupted anyway, and prices are rising as armed actors extract levies mid-route. These practices illustrate how armed groups and civic authorities replicate governance functions through taxation, reinforcing the persistence of a war economy (KII 01/08/2025).

Impact on livelihood and economic activities

The conflict has precipitated a massive economic collapse across Sudan, with deep consequences for household earnings and employment. Projections estimate that Sudan's GDP could fall by 42% under an extreme conflict scenario by the end of 2025 or a contraction of 32% under a moderate scenario (Ahmed et al. 25/06/2025; CGIAR 10/07/2025). These fragmented fiscal systems erode state legitimacy while entrenching localised power economies resistant to post-conflict reintegration. Across all states, including Darfur, annual per capita income has already shown significant decline. At the national level, the contraction could translate into an estimated 4.6 million job losses (44.7% of the workforce). Within this, the services sector, historically the largest employer, is projected to shed 2.3 million jobs (a 40.5% drop), while the industrial sector could lose 1.7 million jobs (a 61.5% decline) (Ahmed et al. 25/06/2025).

Although specific job loss figures for West and Central Darfur are not always available, both regions are deeply affected by the conflict. West Darfur, especially Al Geneina, has seen intense violence and widespread displacement, while Central Darfur, particularly Zalingei, continues to experience recurrent clashes (SI 23/05/2024; HRW 09/05/2024; Concern 19/12/2024; OCHA 31/12/2024).

This suggests that the broader economic downturn likely disproportionately affects urban hubs in West and Central Darfur, which once served as regional trade and economic centres. This is because their specialised economies are structurally dependent on what has become the disrupted flow of goods and capital from Khartoum, other Sudanese states, and cross-border routes, making them highly prone to the collapse of long-distance transport, market attacks, and the esnuing breakdown of financial services. The collapse of daily formal and informal labour markets in Al Fasher and observed migratory outflows from Zalingei to Chad further highlight localised economic shock and escalating urban impoverishment (CGIAR 10/07/2025; OCHA 31/12/2024). This remains one of the many drivers of displacement interacting with other drivers in a complex environment.

Market access constraints and security risks have forced many former business owners to abandon entrepreneurial livelihoods and shift into manual wage employment. Key informants reported that labour engagement has become highly gendered, with women increasingly filling roles in domestic labour (laundry, cleaning, cooking) and brickmaking (traditionally a male domain), while men are often working in construction (Young and Ismail 04/04/2019; KII 01/08/2025). These piece-rate and hourly wage jobs are precarious and unsustainable, providing low and irregular income, and lead to the erosion of household resilience.

IDPs are also resorting to marginal economic activities, such as selling water from carts, operating rickshaws, or casual agricultural work. In more remote areas – e.g. Golo – men are often unemployed, while women engage in small-scale informal trading to survive, a structural adaptation to the removal of men through conscription, death, or seeking work elsewhere. Despite the increase in household labour participation, skyrocketing inflation and the depreciation of the Sudanese pound have severely eroded purchasing power, and the cost of basic goods consistently outpaces earnings. As a result, covering basic needs is a continuous struggle even for households with multiple earners, as even the diversification of income sources fails to offset inflationary pressures. This economic stress disproportionately affects women, who often bear the main burden of meeting household expenses in the absence of male counterparts, many of whom are unemployed, displaced, or deceased. Although many livelihoods have collapsed, informants did note that markets remain accessible in some urban and peri-urban areas, and there are no blanket permit restrictions. That said, high market prices, insecurity, and limited purchasing power severely restrict effective participation in market transactions (KII 01/08/2025).

Increased transport costs and disrupted trade routes

The conflict in Darfur has severely disrupted internal trade networks, causing a breakdown of market connectivity and a sharp rise in transportation costs. This has most notably affected the movement of staple grains, livestock, and gum arabic, which are among the region's most heavily affected commodities (FEWS NET 07/11/2023 and 06/01/2024; Rural21 02/04/2024; ACCORD 01/07/2025). Key trade routes have been rendered unsafe or completely inaccessible, including:

- the Nyala–Kas–Zalingei road, which connects major commercial hubs in South and Central Darfur
- the Zalingei–Al Geneina Road (part of the Western Salvation Road), crucial for linking Central and West Darfur
- the Zalingei–Yartiti–Kas–Nyala route, important for transporting agricultural goods from Jabal Marrah region

- the Adré border crossing with Chad, a key international gateway for both trade and humanitarian aid.
- routes linking Al Geneina and Nyala, which serve as vital arteries for the movement of livestock, gum arabic, and other commodities across Darfur and into central Sudan (Darfur24 27/09/2023 and 11/07/2024; Dabanga 27/08/2024; SPARC 14/04/2025 a).

The flow of goods has become erratic and unreliable because of conflict. This disruption has not only hindered commercial activity but also caused widening price differentials, isolating communities and inflating retail prices – consequences that are particularly devastating for food security in an already fragile humanitarian context (SPARC 14/04/2025 a; WFP 11/08/2023).

In July 2024, renewed clashes had a direct and severe impact on food security in Al Geneina, as the city experienced a significant increase in food and fuel prices. This was a direct result of the Sudanese pound's value plummeting against the African franc. The price of a 50kg bag of sugar, for instance, jumped from SDG 120,000 to SDG 155,000 (approximately $199 - $257), while the cost of a barrel of gasoline increased from SDG 600,000 to SDG 800,000 (approximately $996-$1,328). These soaring rates were attributed to the city's reliance on the Adikong border crossing with Chad, after the war rendered the main road to Al Fasher impassable. Heavy taxation from the Chadian Government and difficult travel conditions during the rainy season further complicated the new trade route, contributing to a steep rise in the cost of living, threatening food security, and affecting household coping (Darfur24 01/07/2024).

In Zalingei, the conflict has caused unprecedented inflation and triggered a severe humanitarian crisis. This is a direct result of disrupted supply chains, high transport costs, and a reliance on expensive imports from neighbouring countries, including CAR and Chad. The prices of staple goods have surged dramatically, crippling the local economy, with a sack of sugar costing SDG 125,000 and a jerrycan of cooking oil soaring to SDG 55,000 in just two weeks. A sack of flour has reached SDG 50,000, causing the price of a single loaf of bread to rise to SDG 200, while a gallon of fuel has skyrocketed to SDG 16,000, hampering farming efforts and making transportation nearly impossible. These conditions have led to widespread dissatisfaction among residents, who described their living conditions as "extremely difficult" and warned that the city was on the brink of a humanitarian disaster, with a potential famine and a notable shortage of medicine and children's food (Radio Tamazuj 12/06/2024).

A combination of physical road closures and a growing array of administrative barriers placed on traders drive the rise in trade costs. These burdens include checkpoint fees, bribes, and security payments for military escorts, often compulsory and imposed by armed groups, which feed into the war economy and further breed economic deterioration and conflict. Traders pass these costs directly on to consumers, leading to significantly higher retail prices. The impact tends to be more widely felt by low-income households (KII 01/08/2025). A key example is the Nerteti section of the Nyala–Kass–Zalingei road in Central Darfur, which faced repeated closures between late 2024 and early 2025 of up to six months as a result of recurring confrontations between RSF and the Sudan Liberation Army/Abdul Wahid Al Nur (SLA–AW) (ST 10/07/2025; Dabanga 15/07/2024). The closures occurred during the harvest season, possibly intensifying food availability issues (FEWS NET 09/10/2024). These blockages prevented the consistent movement of commercial goods, including staple grains (sorghum, millet), livestock, fuel, fruits, and vegetables from Jebel Marra, besides discouraging traders from using essential routes and exposing them to insecure paths and secondary costs. The impact includes disrupted supply chains, limited market access, and price spikes not only locally but with broader ripple effects in secondary markets (SPARC 14/04/2025 a; KII 01/08/2025). Road blockages generally more severely affect rural communities than urban areas. The former experiences longer-lasting loss of market access and livelihood disruptions, whereas urban centres experience sharper but more immediate shocks, such as price spikes and service disruptions (FEWS NET 30/09/2023). The cumulative transaction costs create inflationary pressure even in non-blocked zones, further entrenching crisis-wide market distortion.

Even where roads remain nominally open (i.e. when they exist but do not work), moving goods has become prohibitively expensive, as soaring fuel prices, payments for military escorts, and informal fees at numerous checkpoints have driven up the cost of trade. For example, transport costs for millet and tombac have increased four- to fivefold compared with prewar prices. Armed groups, including SAF, RSF, and SLA factions, have established unofficial checkpoints that extract payments from passing trucks; a single truck travelling between Al Geneina and Zalingei may encounter up to 20 checkpoints, with total fees amounting to around SDG 77,000 (about USD 32) or more than six times the country's minimum monthly wage of approximately USD 5 (Workpay 09/05/2025). Traders also face unpredictable local taxation, significantly longer travel times given detours, and the persistent risk of looting, all of which increase operational costs. The cumulative risks and cost of trade have forced some traders to go out of business, especially if they had lost their initial capital to looting early in the war (SPARC 14/04/2025 a and 14/04/2025 b). Many large markets have contracted or closed, and the flow of goods has become erratic and unreliable. One trader highlighted that transporting a 50kg item from Adré to Zalingei costs around SDG 6,000- or two-months' worth of income for minimum-wage workers and nearly 20% of a median monthly salary. These expenses are ultimately passed on to consumers and contribute to sharp price increases in local markets, as well as the cyclical feedback loop in which price hikes feed into wage demands and further erode purchasing power (Dabanga 16/04/2020; SPARC 14/04/2025 a and 14/04/2025 b; KII 01/08/2025).

Amid economic vulnerability, families are resorting to potentially harmful coping strategies, such as skipping meals (KII 01/08/2025). Worsening malnutrition rates have pushed communities into IPC Phase 4 (Emergency) and, in some cases, Catastrophe (IPC Phase 5) food insecurity levels (IPC 27/06/2024; FEWS NET 05/09/2024). In Al Geneina, millet prices went up by 180% and sorghum by 140% between April 2023 and January 2024. Families are also reporting sharp increases in the cost of firewood and charcoal because of shortages and high transport costs caused by insecurity. In Zalingei, millet prices rose by 160% and sorghum by 120% over the same period (FEWS NET 05/02/2024; SPARC 14/04/2025 a and 14/04/2025 b). The slower rise in prices in Zalingei compared to Al Geneina can be attributed to relatively better road networks, less intense market destruction, more diversified supply routes, and lower reliance on volatile cross-border trade with Chad, which makes Al Geneina more vulnerable to severe supply shocks and inflated transport costs (Darfur24 01/07/2024; Dabanga 18/03/2015; FEWS NET 30/09/2023).

In response to the insecurity and fuel cost and availability issues, many traders in both urban and rural settings have adopted risk-avoidance strategies, such as transporting smaller quantities of goods using animal-drawn carts or smaller vehicles and taking longer indirect routes (KII 02/10/2025).

While these methods may reduce exposure to violence, they substantially increase per-unit transport costs and further reduce the volume and efficiency of trade. This has gradually led to the departure of most independent large-scale crop exporters from Darfur, and many have left Sudan altogether. This is attributed to a combination of high risks, including the looting and theft of entire shipments, as well as high rental costs and taxes that have made business unprofitable for some traders, pushing them out of the market (SPARC 14/04/2025 a and 14/04/2025 b). As a result, trade is increasingly localised, meaning urban markets primarily serve their immediate surrounding rural areas. This kills fair competition and raises the cost of aid while simultaneously making grassroots responders the most essential factor for reaching those in need. Transportation costs remain high, and the prices of basic goods continue to rise (SPARC 14/04/2025 b and 17/10/2025; RI 19/09/2025). These pressures are deepening market fragmentation, creating a shift from a semi-integrated regional system into a fragmented set of subsistence micromarkets and worsening food insecurity for communities that rely on stable, affordable access to essential goods.

Market destruction, looting, and functionality challenges

Targeting markets deprives civilians of food, livelihoods, and safe spaces, compounding the humanitarian crisis. Both SAF and RSF, through shelling and aerial bombardment, have attacked markets, often on market days when civilian presence is high, resulting in significant civilian casualties (SPARC 14/04/2025 a). The large-scale looting of markets and forcible seizure of goods were widely reported in the early months of the conflict in Darfur. West Darfur, for example, experienced particularly severe destruction in and around Al Geneina. Armed violence destroyed the Grand Market, IDP camps, warehouses, and state and humanitarian infrastructure in mid-2023, forcing thousands to flee and collapsing the local economy following the loss of critical assets and displacement (UNHCR 10/10/2023; Dabanga 02/05/2023; Reuters 26/05/2023). In Central Darfur, meanwhile, armed groups looted shops and banks, plundered, and set Zalingei's markets ablaze in June 2023, resulting in a serious cash crisis (Insecurity Insight 01/2025; HRW 09/05/2024; Dabanga 13/06/2023). By the end of the year, the market had started to slowly come back to life, with traders cautiously replacing permanent shops with temporary street vending and relying on localised trade networks and informal security arrangements to mitigate extreme risk (Radio Tamazuj 16/11/2023). Many also adapted by moving from the main market in the town centre to smaller markets, such as Murrain and Crowley markets in the east (Radio Tamazuj 16/11/2023; SPARC 14/04/2025 a). The violence has also extensively damaged or destroyed homes and public buildings, overall, severely undermining food supply chains and economic resilience (Dabanga 13/06/2023; Insecurity Insight 01/2025; UNSC 17/04/2025).

Agricultural production challenges and livestock looting

Displaced landowners, many of whom have become refugees, have informally assigned caretakers to manage their land in their absence. It remains unclear as to whether they are receiving income or yields from this arrangement. This could, in the long run, result in long-term dispossession and land tenure erosion. In several areas, RSF affiliates and Arab ethnic groups have systematically and opportunistically seized control of farmland, reflecting broader dynamics of forced land dispossession. These groups dictate agricultural activity, including decisions on crop selection potentially at the expense of staple crops such as sorghum, which raises food security concerns. This compromises local food livelihoods and feeds into export-oriented revenue streams. There are credible reports that RSF affiliates have allowed their livestock to graze on standing crops shortly before harvest, leading to widespread destruction. These acts appear to be systematic rather than opportunistic, as they have occurred across multiple localities. This undermines not only subsistence but also potential resilience. With the heightened threat of theft or destruction, farmers have resorted to drying peanuts indoors. This presents multiple challenges, including poor ventilation, lower drying quality, lower yields, and health concerns from dust and mould accumulation (KII 01/08/2025).

RSF has made a move to consolidate power through the economic control of land, livestock, markets, and export monopolies. Armed RSF parties have systematically seized livestock from unarmed tribal communities, particularly in areas depopulated by conflict. The group has militarised and gained control over traditional herding routes, restricting access or demanding passage fees from herders. This disrupts seasonal migration patterns and potentially longstanding intercommunal grazing agreements, representing a breakdown in some conflict mitigation systems. These dynamics coincide with a broader economic shift. RSF has spearheaded an agrarian transition in western Sudan, dismantling subsistence farming and replacing it with commercial livestock systems that underpin Sudan's wartime economy (MERIP 10/04/2024; (KII 01/08/2025).

Livestock exports have surged. In March 2024, Sudan's finance minister claimed that 4.7 million livestock heads were exported in 2023, more than double the year prior, with most shipments bound for Saudi Arabia via Port Sudan. These proceeds likely benefited the SAF-aligned Government and a few powerful elite traders, who used the hard currency to finance the war and monopolise trade – to the detriment of small-scale herders forced to sell at depressed prices (ACCORD 01/07/2025; Atar 18/07/2025). Although no recent animal census exists, available evidence suggests that much of Sudan's remaining livestock is currently concentrated in RSF-controlled western regions, particularly around Al Geneina (MERIP 10/04/2024; KII 01/08/2025). This translates to unequal food access and heightened vulnerability for those relying on mixed farming.

Arab pastoralist groups, particularly the Kababish, are facilitating the movement of large numbers of livestock across smuggling routes into Egypt and Libya. While nominally allied with SAF to guard buffer zones, some Kababish elements have exploited this position for profit. SAF's tolerance of these dual roles has drawn criticism and appears to be eroding its credibility among communities (KII 01/08/2025).

Livestock owners, particularly from non-Arab communities, have suffered major losses from RSF affiliates seizing herds, often in their entirety. Livestock in these areas are not only a primary source of income but also a core component of cultural and social capital. They represent social safety nets and alternative forms of credit, and their loss compounds existing risks. In many reported cases, these seizures have involved both outright theft and coerced confiscation under the threat of violence. There is also a severe lack of livestock vaccination and veterinary services owing to the defunct ministry. This has led to significant mortality among surviving animals. At the same time, traditional herding routes have fallen under RSF control. In some areas, this has resulted in forced payments or extortion at checkpoints, while in others, non-Arab herders are simply denied access altogether, reproducing patterns of exclusion while deepening intercommunal inequalities. These restrictions have disrupted seasonal migration and contributed to overgrazing in confined areas, accelerating land degradation and reducing post-conflict recovery capacity. Water infrastructure has also been affected. In many areas, the conflict has either deliberately destroyed or rendered irrigation channels and livestock water reservoirs inaccessible (KII 01/08/2025).

In West and Central Darfur, the systematic looting of livestock has become a core component of RSF's militarised rural economy, contributing to the widespread displacement and devastation of communities, particularly the Masalit. While primarily targeting the Masalit, this violence has also affected other non-Arab groups. As RSF and allied Arab militias advanced through the region in 2023, they expelled a significant portion of the Masalit people, particularly from Al Geneina, where the swift collapse of SAF garrisons triggered a rapid breakdown of local markets and herding systems, leading to mass violence and killings. This looting was not incidental but part of a broader agrarian transition, in which traditional subsistence herding and farming were replaced by commercial livestock systems. These systems are defined by their export orientation, RSF taxation, and the creation of market monopolies, which currently underpin Sudan's war economy and are linked to smuggling networks extending northwards into Libya and Egypt. This continues to influence border economies fuelling illicit trade and drawing in regional stakeholders. By seizing control over this vital resource, with most of the country's livestock located in Darfur, RSF has been able to fund and sustain its operations, making it a fundamental part of its financial base. This resource control has also affected urban food supplies, caused meat and dairy scarcity, increased prices, and affected humanitarian pipelines. Simultaneously, the targeted violence used to dismantle these traditional livelihood systems risks the permanent displacement of communities and the irreversible loss of their communal land rights (MERIP 10/04/2024). This could also translate into postwar contestation over land restitution.

In West Darfur, millet and sorghum production has notably declined. Sorghum production decreased from 60,100 tonnes in 2023 to 59,000 tonnes in 2024, while millet production dropped from 44,800 tonnes to 56,700 tonnes over the same period. In 2023, Central Darfur produced more millet (63,800 tonnes) but less sorghum (50,800 tonnes) than West Darfur; 2024 data for Central Darfur is not available (FAO 03/2025 and 16/04/2024).

For groundnuts and sesame, the available data is less complete. In West Darfur, groundnut production was 12,200 tonnes in 2023, but data for sesame was not available. For Central Darfur, no production data was available for either groundnuts or sesame in 2023. There are also no recent production figures for groundnuts or sesame for either region. This suggests that these crops may not be as widely produced as cereals, or that their production data is not a primary focus of the assessment at the state level (FAO 03/2025 and 16/04/2024).

In West Darfur, sorghum and millet production is expected to only marginally improve from the previous year's near-zero levels. Production is projected to remain over 90% below historical averages – a situation primarily linked to continued insecurity preventing large-scale

cultivation. In Central Darfur, a strong rebound is projected for sorghum, with production and yields expected to increase by 311% from the 2023–2024 season, although this recovery is narrowly focused. Millet production is forecast to be just 25,300 tonnes, which is only 5% of the average yield. Similarly, sesame and groundnut production are expected to remain at near-zero levels (FAO 03/2025 and 16/04/2024).

This selective recovery highlights a distressed adaptation strategy in which farmers concentrate on sorghum, the calorie-dense staple most likely to survive under volatile conditions, while abandoning more input-intensive or less secure crops. While rational in the short term, this coping approach undermines long-term resilience by eroding crop diversity and income sources. If insecurity persists, reliance on sorghum monocropping is likely to continue; if conditions stabilise, farmers may gradually revert to mixed cropping. The current trend also raises nutritional concerns, as the reduced production of sesame and groundnuts limits household access to oils and proteins, further heightening dietary risks. Groups more vulnerable to food insecurity, including pregnant or lactating women, older people, and children, are projected to feel the impacts more widely.

Table 2. Product comparison (1,000 tonnes)

CROP	LOCATION	2023–2024 PRODUCTION	2024–2025 FORECAST
Sorghum	West Darfur	Near-total collapse (zero output)	Marginal improvement; over 90% below historical averages
	Central Darfur	10% of previous year's output	Strong rebound of 311% from 2023–24; still 26% below five-year average
Millet	West Darfur	Near-total collapse (zero output)	Marginal improvement; over 90% below historical averages
	Central Darfur	19% of previous year's output	25,300 tonnes (5% of average)
Groundnuts	West Darfur	Zero production	Near-zero levels
	Central Darfur	28,100 tonnes	Near-zero levels
Sesame	West Darfur	Zero production	Near-zero levels
	Central Darfur	Not specified (implied near-zero based on context)	Near-zero levels

Source: ACAPS using data from FAO (16/04/2024 and 03/2025)

Humanitarian access and operational constraints

Humanitarian aid delivery in Darfur faces significant operational constraints and access challenges, which are primarily security-driven. There are reports of aid blockage along the Al Dabbah–Melit–Al Fasher route in North Darfur that connects northern supply lines to Central Darfur, with RSF fighters intercepting food and medical supply convoys for more than two years by 2025. This has serious implications for the wider region, exposing conflict-displaced families to further risks of famine. The supplies are most likely looted and do not reach the intended audience (TNH 11/04/2025). This obstruction signals deliberate control of humanitarian leverage.

SAF suspended cross-border aid through Adré in February 2024 despite lacking a presence there, only authorising it again in August. This could signal a collapse in neutral humanitarian mechanisms, with conflict parties exerting administrative control beyond their territorial reach. Since then, WFP has delivered 30,000 metric tonnes of food via Adré, alongside cash assistance, reaching around 2.8 million people, not dependent on the route. Yet, this remains far below needs, with nearly seven million facing extreme hunger and recipients not consistently supplied each month as famine conditions demand. By comparison, over 560,000 tonnes were distributed during the 2004–2005 crisis, underscoring the scale of the current shortfall (TNH 11/04/2025). Aid flows from Chad to Sudan are also down by about 50% compared to needs, with only 1,300 trucks reaching Darfur between August 2024 and February 2025 instead of the 2,600 needed monthly (IRC 09/04/2025). This is attributed to delays, bureaucratic red tape, and infrastructural shortcomings.

Key informants reported that disputes between the SLM and RSF primarily over the control of key corridors can result in aid blockages. In such instances, RSF fighters hold aid trucks for several days or weeks, releasing them only after the SLM or, sometimes, humanitarian organisations pay ad hoc fees or bribes (KII 01/08/2025). These payments effectively entrench RSF's war economy by extracting rents from humanitarian flows. RSF's new aid body, the Sudanese Agency for Relief and Humanitarian Operations (SARHO), also froze permits in late 2024 to pressure organisations to register under its authority, mirroring the state's Humanitarian Aid Commission. Aid workers were faced with the choice of either complying with SARHO and risking expulsion by Port Sudan or refusing and having operations shut down locally (TNH 11/04/2025). This portrays the double sovereignty dynamics aid groups are navigating in dual regimes.

The cost of supply chains running through landlocked Chad makes Darfur among the most expensive areas for humanitarian operations, and relief often arrives late and covers only fractions of the famine-affected population. SAF has ignored several UN requests to scale up, such as deploying permanent staff, repairing a key bridge between West and Central Darfur, and setting up field infrastructure, leaving operations restricted to convoys without independent monitoring and increasing the risk of diversion (TNH 11/04/2025).

Cash transfer projects face similar distortions. Organisations must use large traders, some with RSF or SAF ties, because of banking collapse and insecurity, raising the possibility of humanitarian cash having become a channel for conflict parties. Commissions range from 10% in towns to as high as 25% in rural areas, sharply cutting aid value for households. In August 2025, food basket and child nutrition distributions were suspended in some regions for two months because of funding shortages, blocked access, and looting risks, with children, IDPs, and the urban poor most affected (KII 01/08/2025).

Amid these failures, local mutual aid groups and emergency response rooms have stepped in. Native administrations, women's associations, and youth groups often draw on nafeer traditions that hosted IDPs (CSF 01/09/2025). Women lead communal kitchens and shelter provision, relying largely on their own scarce resources without external support. Communities pool money sustaining food and shelter contributions for only a few months. While this fills critical gaps, it also exposes them to depletion and protection risks; these groups are likely to have absorptive limits in terms of to what extent such volunteer-based systems can practically sustain protracted crises (TNH 26/02/2025; KII 01/08/2025).

Though donors supported these groups with tens of millions in 2024, funding cuts, especially after the US withdrawal, have severely constrained them, causing both SAF and RSF to accuse volunteers of collaboration with the other group and putting them at risk of crackdown once state institutions return (TNH 26/02/2025; KII 01/08/2025). This gives way to a future governance dilemma in that localisation risks being delegitimised in postconflict settings, complicating long-term recovery and trust-building.

EMERGING ECONOMIC TRENDS

Table 3. Emerging economic trends

TREND	DESCRIPTION	HUMANITARIAN IMPLICATIONS
Reliance on informal markets and bartering	• Formal markets and banking systems in West and Central Darfur have collapsed. Communities increasingly depend on ad hoc bartering and informal trade. In border areas, people use the Central African franc in place of the Sudanese pound. Communal kitchens are used where available (EST 24/03/2025; Darfur24 18/05/2024; Radio Tamazuj 11/03/2024; Darfur24 01/07/2024). • People resort to selling items from humanitarian food baskets to acquire other essential goods they truly need (KII 01/08/2025).	• This undermines economic stability and purchasing power, complicates aid delivery, and deepens inequalities in access to food and basic services, particularly among low-income households.
Rise of "money markets" and informal financial services	• Informal "money markets" (e.g. souq el gurush in Zalingei) substitute for banks, offering high-risk, high-cost services (SPARC 14/04/2025 a). • Large market traders act as informal cash couriers, facilitating transfers for civilians but charging a substantial commission, sometimes as high as 20–25% (KII 01/08/2025).	• There is increased risk of exploitation, lack of regulation, and financial exclusion of the people made vulnerable by the conflict to displacement, particularly women and IDPs.
Shift to petty trade and precarious wage labour	• With agriculture and pastoralism disrupted, many – including women and youth – resort to low-income trade or insecure jobs in cities and IDP camps (Radio Tamazuj 11/03/2024 and 12/06/2024).	• This exposes populations made vulnerable to economic shocks by the conflict and displacement to labour exploitation, limits income-generating opportunities, and increases child labour and gender-based vulnerabilities.
Increased dependence on smuggling and illicit economies	• Given unsafe transport routes, communities turn to smuggling food and fuel. Traders face extortion and taxation by armed groups (IFPRI 08/2023; FEWS NET 05/09/2024, 01/02/2024, and 06/2024; ACJPS 18/12/2023).	• This fuels insecurity and violence, erodes the rule of law, and limits humanitarian access to affected areas.

Escalating reliance on humanitarian aid	• With economic activities nearly halted, communities have become increasingly dependent on aid distributions and cash support to survive. • This reliance on external assistance not only heightens the pressure on humanitarian systems but also limits the resilience and self-reliance of communities, creating a cycle of dependency (EST 24/03/2025; Darfur24 18/05/2024).	• It heightens the pressure on humanitarian systems, creates aid dependency, and limits community resilience and self-reliance.
Cross-border trade as a lifeline	• Informal trade with neighbouring countries such as Chad has become an essential lifeline for accessing food and fuel. • While this trade helps to fill critical supply gaps, it is a complex and vulnerable system. It faces risks from conflict spillover, regulatory crackdowns, and price volatility, making it an unpredictable source of sustenance for many communities (FEWS NET 05/09/2024, 01/02/2024, and 06/2024; ACJPS 18/12/2023).	• It helps fill supply gaps but remains vulnerable to conflict spillover, regulatory crackdowns, and price volatility. This can also be turned into a means of for-profit resource extraction for armed groups to operate their war economies.

ANTICIPATED ECONOMIC IMPACTS

Entrenchment of the war economy

The illicit trade in gold and gum arabic is expected to remain a primary financial backbone for both SAF and RSF operations. Gum arabic looting has escalated sharply since 2023 and is unlikely to stabilise given its high demand and ease of smuggling. Warlords and commanders will continue to profit from this trade, with exports still flowing primarily through the UAE, which remains the largest buyer of Sudanese gold and a major re-export hub for gum Arabic (Chatham House 26/03/2025). The UAE's position as a trade hub reinforces opacity in tracing conflict commodities.

RSF's reliance on illicit trade networks through Chad and Libya will likely continue to sustain their operations. This creates mutual dependence with the potential regionalisation of the conflict economy. These routes not only channel resources but also deepen RSF's ties with foreign traders, militias, and smuggling networks in southern Libya and northern Chad, entrenching external parties in Darfur's war economy. Increasingly, these corridors are being institutionalised through checkpoint taxation and protection rackets, providing RSF with steady revenues akin to state systems of customs collection (KII 01/08/2025). This self-sustaining system perpetuates the conflict and generates new revenue streams. These include the diversion of humanitarian aid, fuel smuggling across borders, and profits from arms trafficking, further criminalising commerce. The growing criminalisation discourages formal traders and humanitarian responders from operating in Darfur's markets, deepening community dependence on war parties and informal networks.

RSF is anticipated to continue prohibiting the use of new Sudanese banknotes in areas under its control, maintaining financial autonomy while undermining SAF authority (KII 01/08/2025). The humanitarian consequence is stark; people in RSF areas are cut off from the national banking system and increasingly reliance on barter, in-kind aid, the Central African franc, and cross-border traders to access goods and services, further inflating logistical costs.

Finally, RSF's control over herding pathways and the facilitation of livestock movement out of Sudan is also expected to persist, helping consolidate the group's foreign currency reserves (KII 01/08/2025). This creates a double blow: rural households lose their key livelihood asset, while urban consumers face rising meat and dairy prices as affordable protein is siphoned off to export markets in Libya and Egypt.

Increased humanitarian aid dependency

Given continued economic collapse and livelihood disruptions, communities will remain heavily reliant on humanitarian assistance for survival as formal economic activities are structurally eroded (EST 24/03/2025; Darfur24 18/05/2024). The cessation of food baskets and child nutrition aid from international organisations will likely continue to aggravate this dependency. These suspensions have been driven by both funding shortages and insecurity, including the looting of convoys and restricted access to RSF-controlled areas. As a result, households are increasingly forced into potentially harmful coping strategies, such as selling off their remaining assets, engaging in cross-border smuggling, or resorting to early marriage to secure income and reduce household burden (KII 01/08/2025).

Deepening financial system collapse

The severe cash shortage and exorbitant transfer fees (up to 25% in Al Geneina) are expected to persist, largely with the suspension of banking services in RSF-controlled areas (Dabanga 22/09/2024 and 04/09/2024). This will lead to a loss of trust in formal finance and further delay potential market recovery. These fees apply to both domestic transfers within Darfur and cross-border remittances from Chad, with rates more than triple the preconflict baseline of around 5–7%. Informal 'money markets' will continue to proliferate, and mobile banking applications will carry high commission rates (e.g. 10% in Zalingei) (SPARC 14/04/2025 a).

Most of these platforms are semi-independent rather than directly RSF-controlled, but they operate under RSF oversight in its territories. Network disruptions frequently hinder their feasibility at scale, especially in rural areas, limiting them to urban hubs (KII 01/08/2025).

The widespread looting of bank branches and suspension of services underscore the severe fragmentation and collapse of the formal financial system. This has direct implications for humanitarian programming. NGOs and UN agencies cannot rely on local banking infrastructure to disburse cash, forcing them to operate through high-cost informal channels. Reliance on informal money transfer agents who charge commissions of 20–25% will likely remain a significant challenge for civilians and humanitarian organisations (KII 01/08/2025). This poses challenges of humanitarian neutrality and cash programming feasibility. While some of these agents are independent profiteers, others are politically affiliated with RSF networks, embedding cash flows into the paramilitary's broader war economy.

RSF's prohibition of the new Sudanese currency in controlled areas will, if continued, further complicate financial transactions. This ban deepens economic fragmentation between SAF- and RSF-controlled zones. People in RSF areas are excluded from the national banking system, forced to rely on barter, the Central African franc, and cross-border intermediaries, while those in SAF areas continue to use the Sudanese pound even as it suffers through hyperinflation (KII 01/08/2025).

Severe unemployment and livelihood erosion

The Sudanese economy contracted by 20% in 2023 and by 15% in 2024. These effects are particularly pronounced in urban hubs such as Al Geneina and Zalingei, but the conflict has extended to urban centres in every state. The service and trade sectors are unlikely to recover, with formal wage employment having sharply declined and the proportion of households with full-time wage earners cut in half. This has resulted in continued mass unemployment and income loss, especially among youth and displaced populations (IFPRI/UNDP 12/11/2024). Women will likely continue to bear the heaviest economic burden, as they are more likely to have no income or be unemployed than their male counterparts. New livelihood activities, often paid by piece or hour, to cover basic household needs in the face of rampant inflation will remain unsustainable and potentially exploitative, reinforcing a gender-specific poverty gap (KII 01/08/2025; UN Women 05/08/2025).

COMPOUNDING FACTORS

Historical marginalisation and underdevelopment

Long before the current conflict, Darfur suffered from chronic poverty, exclusion from national development plans, and weak infrastructure. The region received little investment in public services, roads, and markets, leaving it ill equipped to absorb shocks, such as from climate and displacement, leading to reliance on humanitarian aid to fill governance gaps (MD 12/05/2024; SPARC 14/04/2025 a).

Loss of human capital

Acute food insecurity leads to widespread malnutrition, particularly among more vulnerable groups such as children, risking chronic malnutrition and long-term cognitive impacts. The disruption of education through widespread school closures, the reallocation of schools as designated IDP sites, and displacement and economic hardship mean children are pulled out of school, affecting the future human capital of the region and creating a generation with eroded prospects and reduced recovery capacity (IFPRI 08/2023). Men have been specifically targeted and killed or forced to flee, leading to a significant loss of male labour and placing a heavier economic burden on women with the rise of women-headed households. This rise, however, comes with lower access to assets or credit. Lack of access to education, particularly for children, is a key reason for migration, as families seek safety and decent living conditions outside Darfur (KII 01/08/2025). This is contributing to long-term depopulation and brain drain from Darfur.

Mass displacement

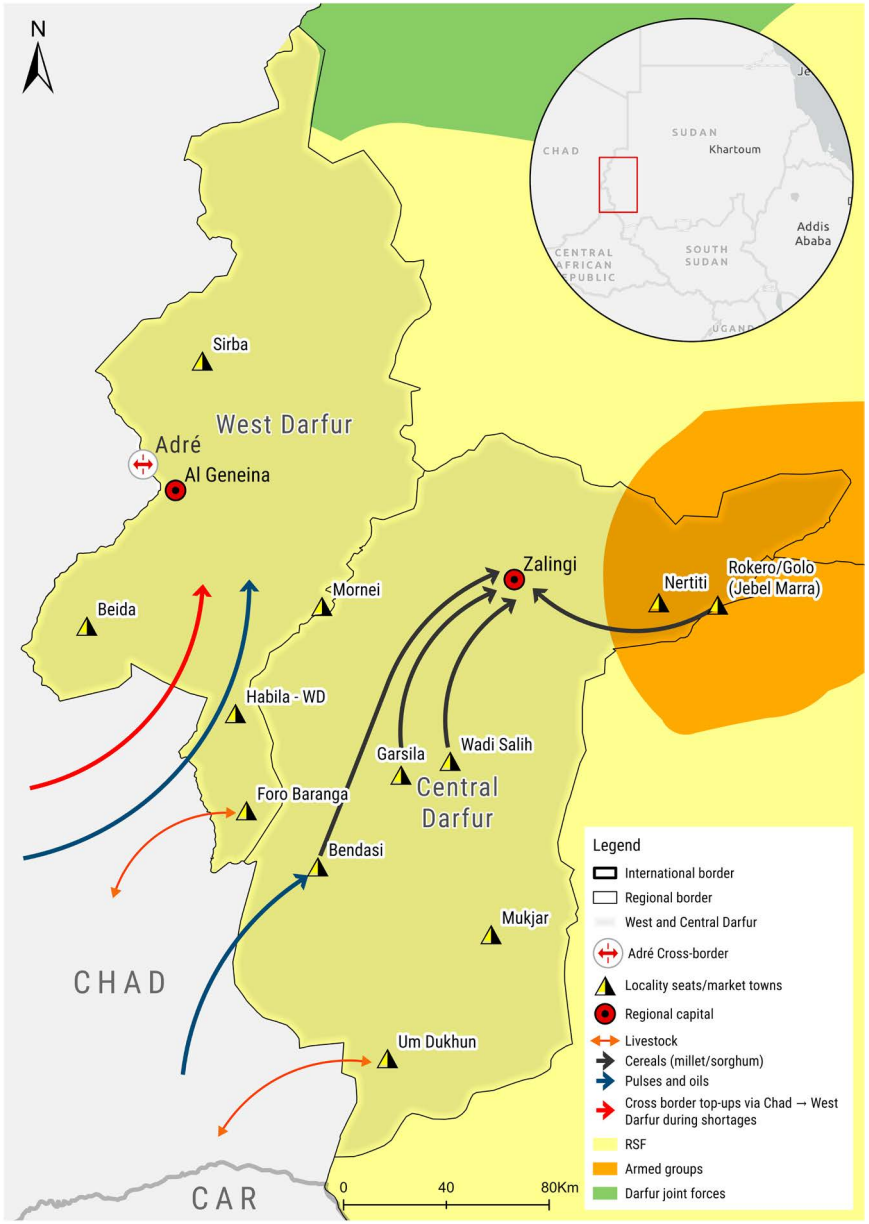
Central Darfur is among the three Sudanese states that host the biggest proportion of IDPs, with an estimated 977,800 individuals or 10% of the total IDP population. The number of IDPs in the state increased by less than 1% between July–August 2025. The state was also the origin for 751,420 displaced individuals and recorded one incident that triggered displacement during the reporting period. In West Darfur, there was also a small increase of 1% in the number of IDPs compared to the previous month, bringing the total to 361,382. West Darfur is also among the five major states of origin for IDPs (IOM 15/09/2025). Levels of displacement have emptied productive agricultural areas, leading to resource conflicts with

IDPs. This also removes the workforce from traditionally productive lands, placing immense pressure on existing resources by causing rising prices and the over taxation of services. If displacement persists for a long time, there is a risk of permanent land abandonment. This could give rise to secondary conflict risks in the future, such as land tenure disputes and urban overcrowding.

Humanitarian access constraints

Humanitarian constraints include logistical challenges and insecurity from road ambushes, arbitrary checkpoints, aerial bombardments, the attack and looting of convoys, and the targeting of aid workers from INGOs and NNGOs. This leaves communities without adequate support to rebuild livelihoods and cope with economic shocks, including currency collapse, the loss of agriculture, and displacement (Sudan INGO 16/05/2023; KII 01/08/2025). This compounds the effects of multiple crises, with acute food insecurity turning into a risk of catastrophic famine, as it disproportionately denies essential aid and livelihoods to the most marginalised and economically vulnerable populations, deepening existing socioeconomic and ethnic inequities.

Map 1. Markets and movement of goods and services



Sources: ACAPS using data from SPARC (14/04/2025 a and 14/04/2025 b); KII (01/08/2025); CCS (22/10/2024)