

STATE FAILURE AND ELITE CAPTURE OF SUDAN'S AGRIFOOD SYSTEM

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Since the outbreak of Sudan's civil war in April 2023, nearly 12 million people have been displaced, and an estimated 44,000 have been directly killed by the violence (UNHCR 2026; ACLED 2025).¹ Many more are estimated to have suffered from war-related disease and malnutrition (Roberts 2025). The decimation of the capital city of Khartoum—the epicenter of the jubilant civilian uprisings in 2019—epitomizes the country's short journey from a promising democratic opening to a failed state.

Failed states often emerge after the breakdown of the political settlement, which refers to the underlying distribution of power in a society, often based on an informal bargain among ruling elites or formal codification in governance structures (Di John and Putzel 2009; Khan 2011; North et al. 2012). A breakdown is more likely when there are shifts in elite coalitions facilitated by exogenous shocks, a failure to institutionalize power-sharing arrangements, or unequal access by elites to external financing. As shown by Reno (1998), if elites cannot cooperate to maintain stability, the state can collapse into competing patronage networks that facilitate warlordism or regional secession.

In Sudan, the breakdown in the political settlement between the army, the Sudanese Armed Forces (SAF), and the Rapid Support Forces (RSF), a paramilitary movement, is the primary cause of the country's contemporary civil war. After being thrust into an uneasy coalition with civilian partners in 2020, the SAF and RSF forged an unlikely alliance to oust the transition leader, Abdulla Hamdok, in 2021. Yet, the respective leaders—General Abdel Fattah Al-Burhan of the SAF and Mohamed Hamdan Dagalo (known as “Hemedti”) of the RSF—each viewed the other as a threat to political power and economic clout. Galvanized by external actors, including Egypt, Saudi Arabia, and the United Arab Emirates (UAE), neither party had a clear incentive to negotiate peace under the prior political settlement.

1 Displacement figures are current as of early 2026; death toll figures are as of September 2025.

Several studies and reports have highlighted the SAF's and RSF's involvement in multiple industries and economic sectors, which helped to solidify their power (D'Agostino 2025; Gallopin 2020; Verhoeven 2023). This chapter specifically focuses on their involvement in the agrifood system. To do so, the chapter first situates the SAF and RSF in Sudan's recent history and describes their role in the overarching political settlement. It then discusses how these groups amassed their economic fortunes, including through control of natural resources and the creation of conglomerates with diversified interests. The chapter discusses how the SAF and RSF engaged, up until the 2023 conflict, in specific value chains, including livestock, wheat, and horticulture. The conclusion briefly discusses how the conflict has impacted both belligerents' leverage in the agrifood system and the broader lessons from Sudan about business–state relations in fragile contexts.

Data and methodology

Methodologically, this chapter utilizes a case study approach based on process tracing and supported by both secondary literature as well as semi-structured interviews. The interviews were conducted in person or virtually with 50 key informants between August 2021 and September 2024. Purposive and snowball sampling methods were employed to ensure the validity of responses and reliability in selecting the broadest set of key informants (Marshall 1996; Palinkas et al. 2015).² Purposive sampling is a nonrandomized sampling technique that is well-recognized as an appropriate qualitative methodology for gaining in-depth information from the most knowledgeable individuals for the research topic under consideration (Creswell and Plano Clark 2018). While the disadvantage of purposive sampling is that the findings are not generalizable to a larger population and researcher bias may influence participant selection (McNabb 2015), it is a more appropriate method than randomized sampling when details about policy decisions and political economy networks are not well known in the general population (Palinkas et al. 2015; Palys 2008). Indeed, uncovering the role of the SAF and RSF in the agrifood system requires expert knowledge or close familiarity with these actors.

Consequently, the interviewees included agrifood experts with knowledge of the production and marketing structures of the agrifood value chains of

2 Purposive sampling involves choosing informants who are known to be experts on a particular topic. Snowball sampling occurs when each respondent suggests additional interviewees to contact, helping to build momentum until a saturation point is reached, whereby no new information is obtained, or all major stakeholder groups have been included.

interest and political economy experts with insights into the SAF's and RSF's roles in the economy. These criteria allowed us to capture a broad spectrum of information on state–business relations in Sudan's agrifood system. The distribution of key informants is described in Appendix 1. For reasons of confidentiality, respondents' exact identities are not provided, but their expertise and sectoral background are indicated as footnotes when they were the source of key information.

Historical antecedents of elite capture and contestation in Sudan

A vast system of patronage was entrenched during the tenure of Sudan's former president, Omar Al-Bashir, who came to power through a military coup in 1989, reversing a short period of democratic rule under Prime Minister Sadiq al-Mahdi (1986–1989). Al-Bashir concentrated power within his National Congress Party (NCP) and led a personalist autocratic regime whereby he weakened challenges to his rule by fragmenting the security forces, creating overlapping responsibilities among them, and undermining their lines of communication to forestall their ability to engage in a coup against him (Hassan and Kodouda 2019).

Centralization of power around Al-Bashir

Al-Bashir empowered the SAF, the secret police known as the National Intelligence and Security Service (NISS), and a variety of regional militias, including the Janjaweed in Darfur, to deal with localized grievances against his regime.³ By 2008, he had also regularized the NISS' role as a paramilitary fighting force (Hassan and Kodouda 2019). Before the secession of South Sudan, the NISS had benefited greatly from Sudan's petrodollars, which it invested in its fighting and cyber surveillance capabilities as well as in assets in the agriculture sector (Verhoeven 2023), including the Seen flour milling company (El Gizouli 2020; Thomas and El Gizouli 2020).

In 2013, Al-Bashir transformed factions of the Janjaweed into the RSF in response to growing ethnic conflicts that raised questions about whether the SAF would continue to support his rule, especially since the SAF's members were from historically marginalized regions. The RSF initially was placed under the control of the NISS (Kurtz 2024). Similarly, when Al-Bashir

3 The NISS became the General Intelligence Service and was placed within the Ministry of the Interior.

reshuffled his military in 2015, many of those in the NISS were given positions within the SAF command, further blurring the lines between the two entities (ISS 2015).

To retain the loyalty of these different factions, including the NISS, SAF, and RSF, Al-Bashir provided them with significant patronage, directing much of the budget toward the security apparatus (Hassan and Kodouda 2019). He provided these actors with access to lucrative economic resources, such as the export of gold, gum arabic, sesame, and weapons, as well as the import of fuel, wheat, vehicles, real estate, aviation equipment, and construction materials (Gallopín 2020). From 2000 onward, significant control of state-owned enterprises (SOEs) was camouflaged behind companies within the SAF's Military Industrial Corporation (MIC). Coupled with special tax rewards and exemptions for highly ranked SAF officers' businesses during Al-Bashir's regime, the SAF developed deeply rooted economic and financial power (El-Battahani 2016). International sanctions against Al-Bashir's government also motivated the military to develop its own economic resources.⁴

The RSF was also hired by Saudi Arabia and the UAE to fight the Houthi rebels in Yemen (Hassan and Kodouda 2019). In the wake of South Sudan's secession in 2011 and Sudan's loss of the oil reserves there, access to foreign exchange through these activities became especially critical to the survival of the political settlement. Both the SAF and RSF benefited immensely under Al-Bashir's regime and gradually transformed their political influence into business empires through their privileged access to financial resources from commercial banks, tax exemptions, special rules and regulations, foreign exchange, and access to land.⁵

At the same time, insurgent movements against the regime were violently repressed in peripheral regions, such as Darfur, South Kordofan, and Blue Nile. Urbanites, who were becoming increasingly numerous, were co-opted through a series of subsidies, including for flour, bread, and fuel. Civil society organizations, including a variety of unions that coalesced into the Sudanese Professionals Association (SPA) and resistance committees, were often repressed or placed under surveillance. These committees, consisting of university students and unemployed youth affiliated with the Communist and other opposition parties, were originally formed in September 2013 during another set of protests initiated by the reduction of wheat and fuel subsidies. They posed a threat to the neighborhood "popular committees" of the regime,

4 Interview with member of Sudan's transitional government, virtual, January 30, 2024.

5 Interview with former central bank official, virtual, February 13, 2024.

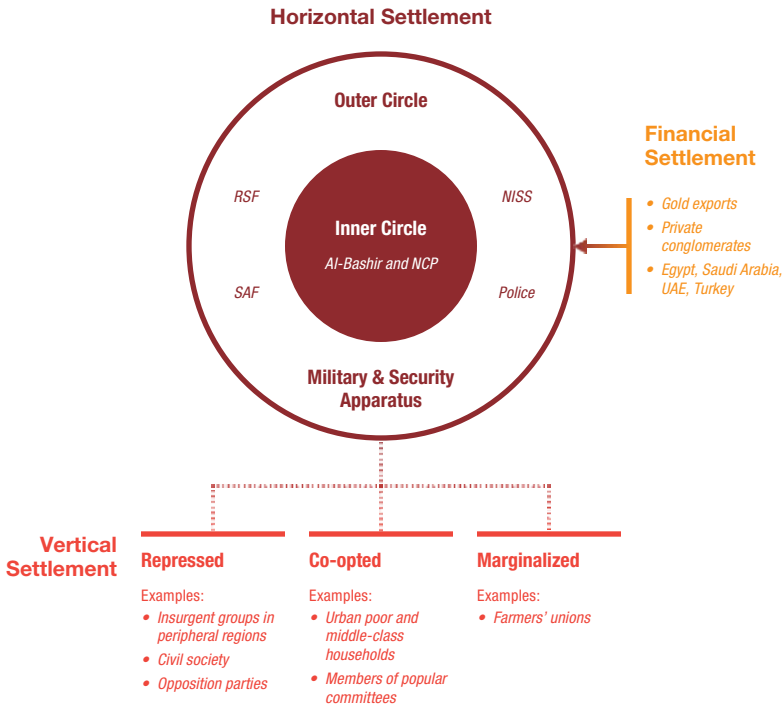
which typically included retired army officers, the mosque imam, and security forces (El Gizouli 2020).

Figure 3.1 presents a schematic of Sudan's political settlement from 2011—when South Sudan seceded—to 2019 and divides the settlement into its horizontal, vertical, and financial dimensions. The distribution of power across different elite actors who comprise the governing coalition constitutes the horizontal dimension. These elites may include political parties and politicians, the bureaucracy, the military, and traditional leaders. Some of these factions are included in power structures and united by either political ideals or materialist interests, while others are excluded. Kelsall (2018) refers to this as the power foundation of the settlement and notes that configurations can be concentrated and/or dispersed. In the former, power is highly centralized within the top leadership, and excluded factions are relatively weak. In the latter, excluded factions are stronger, and the top leadership may depend on an array of short-term bargains and deal-making to achieve its aims.

The vertical dimension, or societal foundation, of a settlement refers to the way in which elites incorporate and manage different societal groups, ranging from trade unions, the media, and business groups to farmers' associations and ethnic networks, among others. These groups may have different types of resources—including economic power, voting weight, and ideational influence—to disrupt extant political institutions. If the group has broad disruptive potential and is united, then the government is likely to co-opt it through mass benefits (such as public housing or state welfare programs); if the group is more divided, then it is likely to be targeted with patronage benefits in return for supporting the government. Narrower groups may either be repressed if they have disruptive resources or marginalized if they do not (Kelsall 2018).

The third dimension addresses how the political settlement is financed (Buur and Salimo 2018; Khan 2011). This might include donor partners, domestic capitalists, foreign investors, and global markets (Usman 2020). Identifying this dimension requires analyzing the ownership structure within specific sectors and understanding the historical relationship between economic actors and the governing coalition (Behuria et al. 2017). Depending on the main sources of financing, negative shifts in the external environment can threaten the extant political settlement, while new windfalls of resources may reinforce it (Usman 2020). Between 2011 and 2018, power was centralized around Al-Bashir and the NCP, bolstered by the military and security apparatus, and largely funded through gold exports and finance from Egypt and the Gulf states. Many groups were repressed during this period, contributing to several civil conflicts across the country (see Chapter 2 in this volume).

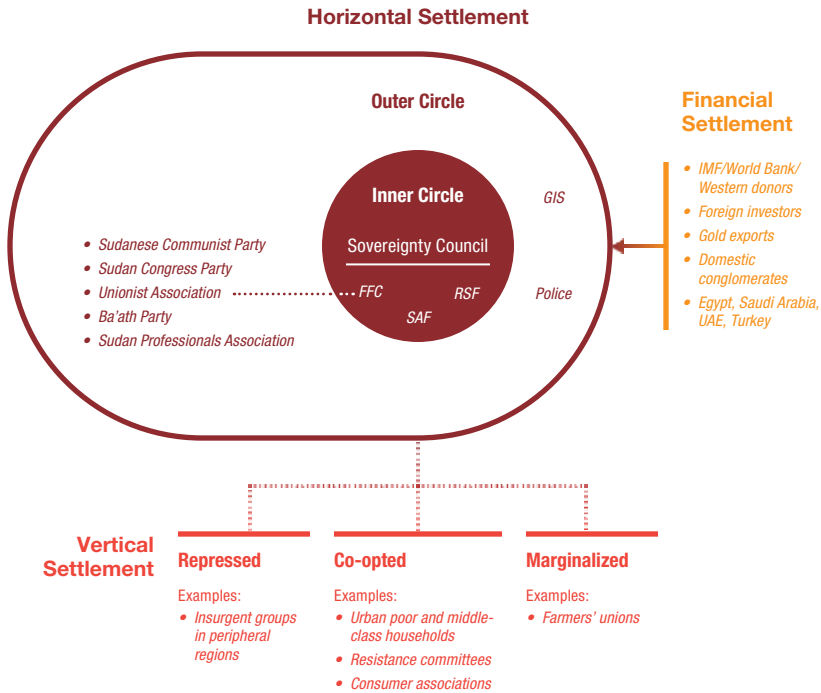
FIGURE 3.1 Sudan’s political settlement, 2011–2019



Source: Partially adapted from Gallopin (2020).

Note: NCP = National Congress Party; NISS = National Intelligence and Security Service; RSF = Rapid Support Forces; SAF = Sudanese Armed Forces; UAE = United Arab Emirates.

This settlement shifted in late 2018 when the escalating price of bread and wheat flour compelled widespread public protests, initially about the rising cost of living but ultimately morphing into a broader set of grievances about government corruption and autocracy (Hassan and Kodouda 2019). Al-Bashir responded by issuing four emergency decrees that banned any gatherings, assemblies, marches, or strikes. However, as protests grew, the SPA took control of the demonstrations and ultimately, with the support of civil society groups and opposition parties, formed the Forces of Freedom and Change (FFC) coalition. When the FFC staged a sit-in at the military headquarters in Khartoum in April 2019, junior officers decided to protect the protesters, and the various elements of Al-Bashir’s outer circle—the military, RSF, and NISS—overthrew the president (Gallopin 2020).

FIGURE 3.2 Sudan's political settlement, 2019–2021

Source: Partially adapted from Gallopin (2020).

Note: FFC = Forces of Freedom and Change; GIS = General Intelligence and Security Services; RSF = Rapid Support Forces; SAF = Sudanese Armed Forces; UAE = United Arab Emirates.

Transitional government

After a tumultuous period in which security forces killed more than 100 pro-democracy protesters in June 2019 outside military headquarters (known as the Khartoum Massacre), a Constitutional Declaration was signed in August 2019 that stipulated the creation of a 36-month post-transition government. This shifted the country's political settlement, creating a more dispersed horizontal power configuration, as shown in Figure 3.2. Specifically, the government was ruled by the Sovereignty Council, which consisted of a coalition between the SAF, RSF, and civilian technocrats led by the prime minister, Abdalla Hamdok, and backed by the FFC. The police and security forces—transformed from the NISS to the General Intelligence and Security Services—also retained significant power.

Because of this fragile alliance, the budget remained skewed toward the military. In addition, the military and security departments continued to control more than 200 state-owned firms, valued at around US\$3 billion and spanning multiple products and sectors, including gold, marble, gum arabic, livestock, telecommunications, banking, pharmaceuticals, and water distribution (Africa Confidential 2021; Sayigh 2023). Under pressure from the International Monetary Fund (IMF), the interim government agreed in March 2021 to begin the process of divesting the military from commercial companies and transferring them to civilian-headed government ministries. This was an essential move, as Hamdok claimed that due to the influence of the security and defense forces on the economy, his government effectively controlled only about 18 percent of the country's public funds (Baldo 2021).

At the same time, the FFC included a broad alliance of actors whose diverse interests hindered consensus on needed economic and political reforms. This was compounded by the variety of external actors who held a stake in the direction of Sudan's post-revolution political settlement. For instance, Turkey had been promised approximately 100,000 hectares of agricultural land to cultivate, with another potential 700,000 hectares under negotiation (Daily Sabah 2021). Even before the revolution, Saudi Arabia and the UAE had negotiated the purchase of some of Sudan's best irrigated land to produce food to feed their own domestic populations (Radio Dabanga 2016). After the ouster of Al-Bashir, both Gulf state governments provided an aid package of approximately US\$3 billion that gave them significant leverage with the transitional military council (The Arab Weekly 2021).

Coup and conflict escalation

The IMF's efforts to work with Hamdok's administration to audit and divest SOEs from the SAF and RSF were one of several factors that prompted the October 2021 coup to oust Hamdok. Both parties signed a Political Framework Agreement with each other and civilian actors in December 2022, which was supported by the international community (UNITAMS 2022). But the underlying emphasis of the reform was to return Sudan to civilian rule, and it involved merging the SAF and RSF, which was opposed by both parties. The RSF leadership's newly found prominence was resented by high-ranking SAF officers (Gallopín 2020). Each side perceived threats to their status and economic interests, ultimately resulting in the eruption of violence in Khartoum in April 2023 before expanding to nine other states, including North Kordofan, North Darfur,

West Darfur, South Darfur, Central Darfur, East Darfur, South Kordofan, West Kordofan, and Blue Nile, albeit with different levels of intensity and magnitude (Siddig et al. 2023).

The SAF and RSF as business actors

The SAF and RSF have adopted parallel yet distinct approaches to building their business empires (Baldo 2021). Both groups have leveraged their ownership of commercial enterprises through domestic and international connections, driven by shared political and economic interests, to generate significant economic profit (Verhoeven 2023). However, the structure of their business operations varies, with the RSF having a more fragmented business model that is largely controlled by segments of the Dagalo family, while the SAF has a more structured approach. The geographic concentration of their agricultural interests also varies. As seen in Figure 3.3, while the SAF's influence is concentrated in northern Sudan, particularly in the River Nile state where the army controls vast tracts of land and water, the RSF wields significant influence in the Darfur and South Kordofan areas, where the paramilitary's historical and tribal connections run deep.⁶

Figure 3.4 highlights the major agrifood companies under the SAF's control, which include finance, livestock, machinery, irrigation, and inputs. The MIC is considered the crown jewel of the SAF's economic empire. It was originally established as a defense manufacturing, automobile, and small electronics company to protect against potential sanctions and disruptions in imports from Western countries (D'Silva et al. 2023; El-Battahani 2016).⁷ Over the years, the institution has evolved to include many different subsidiaries, including in agriculture, which collectively make it a major revenue-generating arm for the SAF. Before the 2023 war, it operated on a five-year strategy that was updated periodically based on the status of the current business. Each business has its own board consisting of both SAF representatives and civilians with technical expertise.⁸

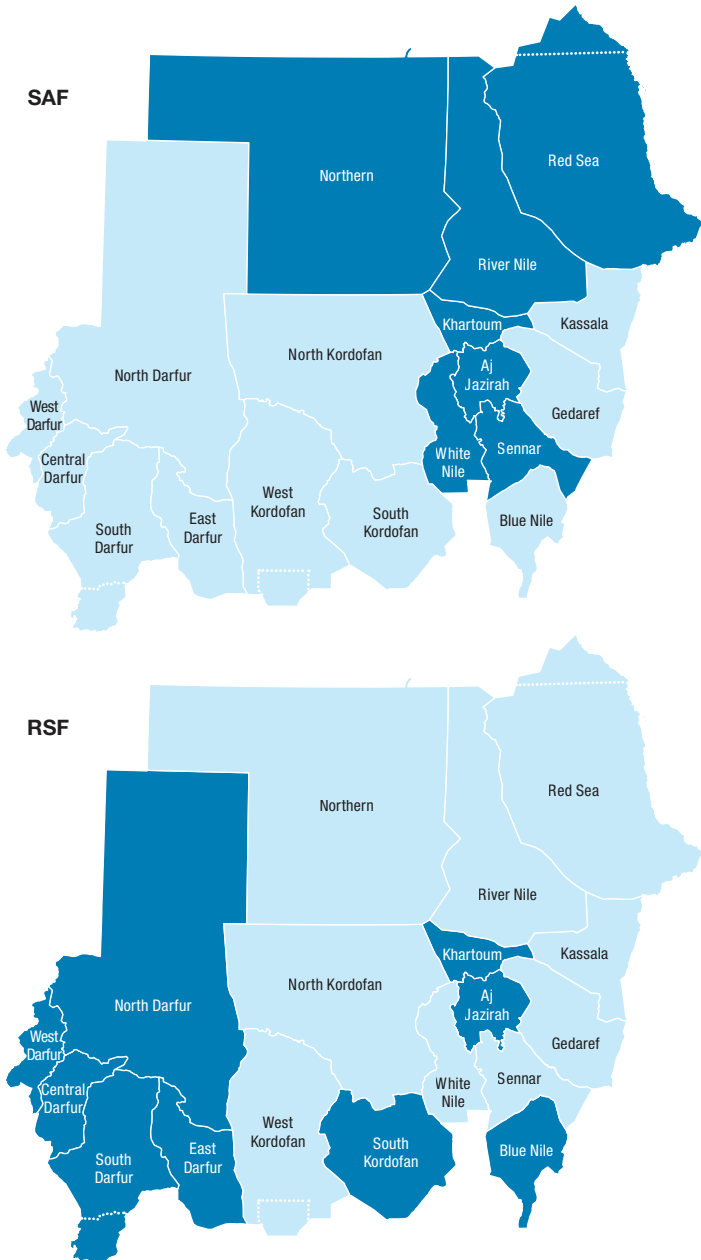
Zadna International Company, an agricultural and construction conglomerate that includes large pivot irrigation schemes in the Northern State, imports chemicals and fertilizers and exports live animals and other crops. It was also previously part of the MIC, but around 2020, it was moved to the Special Fund for the Social Security of the Armed Forces, an ostensible charity investment arm of the SAF, to shield it from civilian oversight (U.S. Department of the

6 Interview with agrifood expert, agribusiness conglomerate, virtual, August 3, 2023.

7 Interview with former SAF industry employee, virtual, September 11, 2024.

8 Ibid.

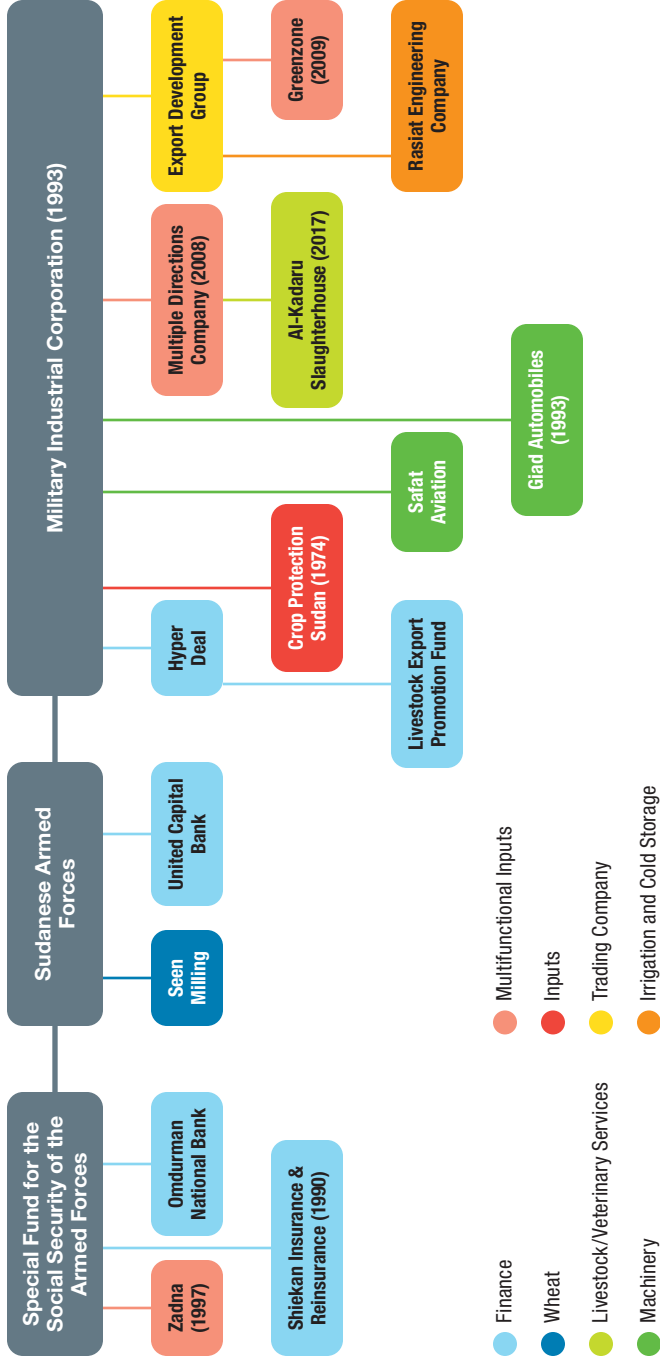
FIGURE 3.3 Geographical distribution of agribusiness dominance



Source: Authors' illustration based on key informant interviews.

Note: Darker blue indicates states of primary activity. RSF = Rapid Support Forces; SAF = Sudanese Armed Forces.

FIGURE 3.4 Landscape of Sudanese Armed Forces' companies



Source: Originally produced in Resnick et al. (2026) based on authors' compilation from interviews, Cartier et al. (2022), and Lanfranchi and Hoffman (2023).

Note: Years in parentheses indicate year of establishment, where available.

Treasury 2024). Interestingly, Zadna is the only institution where representatives of both the SAF and RSF serve on the company's board (Cartier et al. 2022). Beyond Zadna, there are strong clientelist linkages between the agricultural SOEs, the Agricultural Bank, Omdurman National Bank, and the SAF, through SAF institutions and/or members of the NCP that are closely associated with the SAF (Cartier et al. 2022).

The origins of the RSF's business empire can be traced to Hemedti's control of the Jebel Amer gold mines in Darfur and his family's ownership of the gold trading company known as Al-Junaid (Global Witness 2019). Al-Junaid has expanded into a larger holding company with subsidiaries spanning multiple sectors, including banking, agriculture, construction, transport, and information technology (Cartier et al. 2022; Sarkar and de Waal 2023). As shown in Figure 3.4, the RSF has established direct ties with the global banking system through ownership of Al-Khaleej Bank, which received US\$50 million from the Bank of Sudan prior to the onset of the 2023 war (U.S. Department of the Treasury 2024) and maintains several bank accounts and companies in the UAE (Cartier et al. 2022). Most of the RSF's agricultural companies concentrate on livestock and oilseeds. For instance, the RSF acquired 60 percent of the Animal Resources Bank to develop the livestock trade.⁹ The RSF also owns United Ebony, which focuses on goat breeding for export.¹⁰ Another firm, Al-Mahabba Oils, is owned by Hemedti's brother, and the Plant Oils Factory is part of Al-Junaid (Figure 3.5).

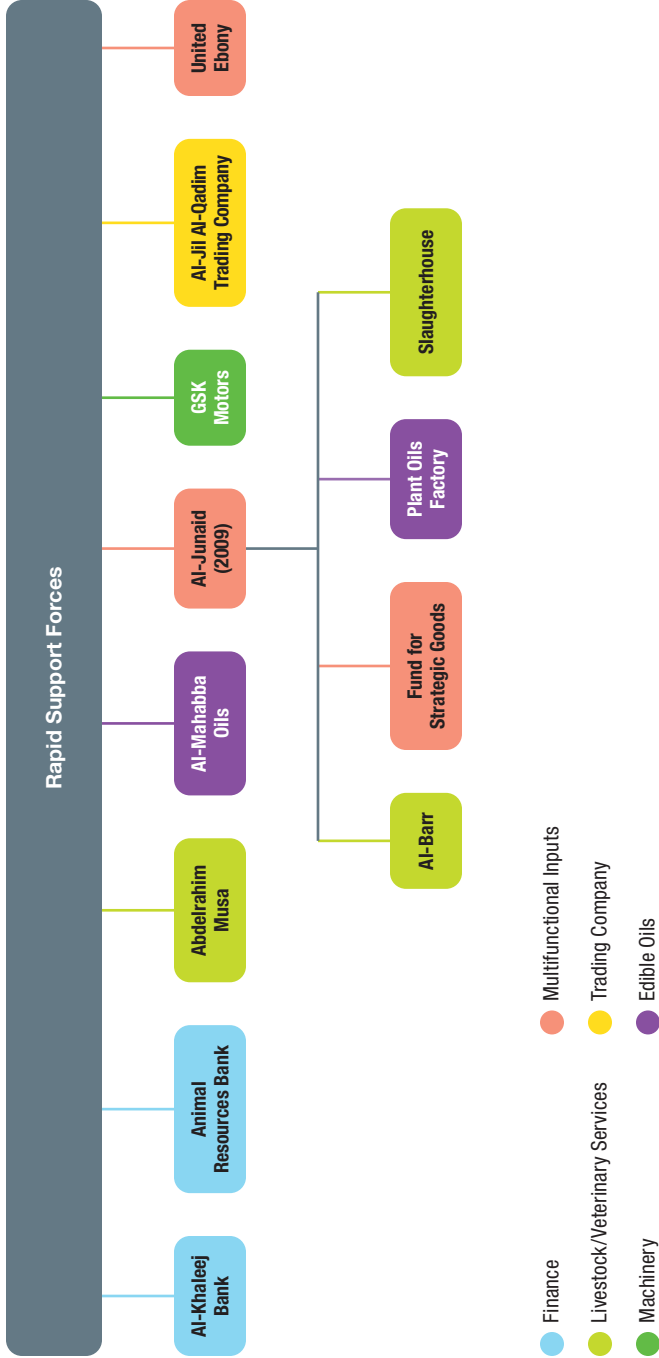
Strategies of engagement in agricultural value chains

Through the companies discussed in the previous section, the SAF and RSF expanded their influence using a distinct set of strategies across diverse value chains. These strategies have varied depending on the technical complexity of value addition and the level of private sector involvement. We discuss here three distinct strategies that the SAF and RSF have used to expand their profit margins and further entrench themselves in Sudan's agrifood economy. These strategies include outright capture in the livestock trade, unfair competition in wheat milling, and the development of niche markets in horticulture.

9 Interviews with agrifood expert from Sudanese conglomerate (August 3, 2023), government transparency expert (July 13, 2023), former Central Bank official (February 13, 2024), and former government advisor (February 14, 2024), all virtual.

10 Interview with former transitional government advisor, virtual, February 14, 2024.

FIGURE 3.5 Landscape of Rapid Support Forces' companies



Source: Originally produced in Resnick et al. (2026) based on authors' compilation from interviews, Cartier et al. (2022), and Lanfranchi and Hoffman (2023).

Note: Years in parentheses indicate year of establishment, where available.

Livestock trade

In Sudan's livestock sector, the SAF and RSF benefit from the opportunity to make high levels of profit with minimal value addition or private sector competition. At least 26 million Sudanese rely on livestock production for their livelihoods, and it is one of Sudan's biggest export earners after gold (World Bank 2020), contributing more than US\$550 million of export revenue in 2022 (Sudan, CBoS 2022). Moreover, it is the largest contributor to agricultural GDP, surpassing both the crop and industrial crop subsectors (Alfadul et al. 2024). About 60 percent of all live animal exports are directed to Saudi Arabia, a third to Egypt, and smaller shares to Qatar, Bahrain, Kuwait, and Lebanon (World Bank 2020). This trade is highly lucrative; exports of live sheep to Saudi Arabia alone have been valued at about US\$400 million annually (Humphrey et al. 2021). The livestock value chain in Sudan is also highly fragmented, involving numerous actors such as input suppliers, small-scale pastoralists, large-scale herders, brokers, transporters, agents, auctioneers, traders, processors, retailers, and exporters (Idris 2007). This fragmentation provides multiple access points for actors to increase rents within the chain.

The SAF primarily focuses on beef cattle, while the RSF trades in sheep, goats, and camels.¹¹ SAF's Multiple Directions Company opened a US\$40 million Al-Kadaru industrial slaughterhouse in 2020, rehabilitated by Egypt, which allows for processed meat exports (Gallopín 2020). A bilateral agreement signed in 2021 allows the SAF to export approximately 2,000 cows per day to Egypt from the slaughterhouse.¹² However, even at the height of its operations, Al-Kadaru has only operated at 55 percent of its maximum capacity.¹³

Due to its deep ties with Darfur and Kordofan—regions known for pastoralism—the RSF has long been involved in the livestock trade. The Dagalo family, historically traders, exported camels to Libya and Egypt two decades ago during Hemedti's leadership of the Janjaweed.¹⁴ Leveraging resources from their participation in the Yemen war, their involvement in the gold trade, and strategic political alliances, the RSF expanded livestock exports to Gulf

11 Interview with livestock expert, international research institute, virtual, February 21, 2024.

12 Interviews with government transparency expert (July 13, 2023), livestock expert (February 21, 2024), and private sector specialist for domestic milling industry (September 12, 2024), virtual.

13 Interview with former SAF industry employee, virtual, September 11, 2024.

14 Interviews with founder of supply chain enterprise (August 3, 2023), agrifood expert from domestic agribusiness conglomerate (August 3, 2023), government transparency expert (July 13, 2023), and gum arabic expert academic (January 31, 2024), virtual.

countries.¹⁵ In 2021–2022, the RSF sought to construct a technologically advanced slaughterhouse north of Khartoum, with US\$36 million in support from the Netherlands (Gallopín 2020).¹⁶ However, due to inadequate business planning, the facility was not equipped with refrigeration, which prevented it from becoming operational by the start of the 2023 conflict.¹⁷

The involvement of both actors in the livestock value chain is largely a modality of rent generation. Through the MDC, the SAF retains the profits from the sales, which are not reported or transferred to the Ministry of Finance and Economic Planning (MoFEP). At the same time, the MDC and SAF have few operational costs, since the MoFEP provides the operation with funding for the trucks, fuel, and drivers to transport the livestock.¹⁸ As one respondent noted, “For Multiple Directions, many people think this is one of the strongest companies of the army because the army needs foreign exchange. They export crops and livestock that generate foreign exchange...There are doubts that the foreign exchange is coming into the Central Bank of Sudan. They [the SAF] can use it instead to import military equipment.”¹⁹ Although livestock is a risky commodity, where exporters can lose about 2 percent of total livestock per shipment, the motivation of rent extraction still makes the value chain very lucrative: “For them [the SAF], it doesn’t matter how much they lose because the goal is to gain revenue, not to build up the value chain or a business enterprise.”²⁰ Due to capacity requirements, much of the meat quality control occurs in Egypt. As one insider notes, “There’s animal quarantine in Abu Simbel in Egypt, and they [live animals] get fattened there. We [Sudan] do not do anything besides export live animals. In livestock, we are not up to the standards.”²¹

It remains questionable whether the involvement of the SAF and RSF in the livestock sector has resulted in significant benefits for pastoralist communities, and there have not been improvements in veterinary health to ensure safer processed meat.²² Sudan often faces import bans and rejections

15 Interview with member of resistance committee, virtual, January 25, 2024.

16 Interviews with agrifood expert from agribusiness conglomerate (August 3, 2023) and private sector specialist with multilateral development organization (August 30, 2023), virtual.

17 Interview with agrifood expert from large-scale sugar company, virtual, July 16, 2023.

18 Interview with government transparency expert, virtual, July 13, 2023.

19 Interview with former member of the transitional government, virtual, January 30, 2024.

20 Interview with agrifood expert from major conglomerate, virtual, April 3, 2024.

21 Interview with private sector specialist for domestic milling conglomerate, virtual, September 12, 2024.

22 Interview with agrifood expert from major conglomerate (July 16, 2023) and private sector specialist for domestic milling conglomerate (September 12, 2024), virtual.

of live animals and processed meat due to noncompliance with sanitary and phytosanitary standards and vaccination protocols (World Bank 2020; Humphrey et al. 2021). Yet, due to the ability to generate high rents, as well as the current high risk for investments in Sudan, there is little incentive for either group to invest in traceability systems, quarantine practices, nutritional feed, cold chain infrastructure, or technical knowledge that could expand Sudan's international markets or meet growing domestic demand (World Bank 2020). As one expert noted, "Nothing has been invested in the livestock sector for decades to improve its value and productivity, even though it's a major export earner for Sudan."²³

The argument that the SAF and RSF focus on the livestock trade because it requires less technical expertise than upgrading the livestock value chain is further reinforced by these groups' absence in the dairy market, where the private sector is much more active. Dairy represents a valuable opportunity for domestic expansion, since most of Sudan's milk remains unprocessed, and dairy imports reached US\$148 million by December 2022.²⁴ However, the dairy industry is technically complex, requiring high standards, costly equipment, and alignment with meteorological conditions.²⁵ As one interviewee noted, "We have observed that both the SAF and RSF are inactive in the dairy value chain. This could be due to the challenge of competing with leading food industries in the field, or perhaps because the dairy value chain system in Sudan is complex and requires specific production technology and standards."²⁶ Although the SAF established the Faapy dairy company in 2013 through the Export Development Group, it went out of business several years later,²⁷ unable to compete with six private sector companies operating milk processing plants in Sudan. The largest, DAL Group, started in the dairy value chain in 1997 and managed a farm of 6,600 dairy cows. The farm featured climate-controlled cattle housing, artificial insemination breeding techniques, and modern milking equipment, positioning it as a leader in the country's dairy sector (World Bank 2020). As an example of functional upgrading, DAL provided numerous dairy products—including pasteurized and long-life milk, yogurts, cheeses, and butters—and managed its own distribution through a fleet of refrigerated trucks.

23 Interview with government transparency expert, virtual, July 13, 2023.

24 Interview with former transitional government advisor, virtual, February 14, 2024.

25 Interview with livestock expert, agribusiness platform, virtual, February 28, 2024.

26 Interview with former transitional government advisor, virtual, February 14, 2024.

27 Interview with former central bank official, virtual, February 13, 2024.

In summary, the livestock sector has proven highly profitable for both the SAF and RSF. Through the MDC, the SAF has a stable export market in Egypt through sales to firms linked to the Egyptian army, allowing it to reinvest profits directly into Sudan's military. The RSF, with its strong ties to trading communities in Darfur and Kordofan and resources from the gold trade, benefits from local trust relationships and favorable pricing with Gulf partners. While upgrading to better quality livestock and higher value-added dairy products could increase market access domestically and internationally, doing so would require significant investments and skill development. With the private sector already more competitive in this area, the SAF and RSF prioritize rent-seeking strategies by focusing on the livestock export trade.

Wheat milling

In addition to livestock, other value chains have appealed to armed actors, particularly commodities for which there is domestic demand, minimal value addition, and therefore little risk. Yet, if the private sector is already involved in such value chains, the predominant strategy of Sudan's armed actors has been competition through a distorted enabling environment.

Due to historical collusive relations between such actors and the state (such as the NCP), armed actors competing with the private sector can benefit from price distortions created by selective import licensing, foreign exchange rationing, and subsidies. For instance, the SAF's exemptions from Sudan's labyrinthine set of levies, including interstate taxes, turnover taxes on production sold by farmers to traders, and the *zakat* (Islamic tax), provide a price advantage to military actors.²⁸ Overall, these mechanisms facilitate a skewed policy landscape, whereby armed actors enhance their competitive advantage through structural power rather than any market-driven efficiencies.²⁹

Wheat milling typifies the competitive strategy used by the SAF. Wheat is a major food commodity in Sudan, especially for urban dwellers who consume substantial amounts of bread. Domestic production in Sudan only covers approximately 15–20 percent of the country's total wheat demand, with the remaining 80–85 percent satisfied through imports (Dorosh et al. 2022; Resnick 2021). In 2022, wheat imports were valued at more than US\$1 billion, which is equivalent to 10 percent of Sudan's total import value (Sudan, CBoS 2022).

Until 1996, when wheat milling was liberalized, the government held a monopoly on wheat imports, which were allocated to 20 small milling

28 Interview with agrifood expert from major conglomerate, virtual, April 3, 2024.

29 Interview with former member of transitional government, virtual, January 30, 2024.

companies through a quota system (FEWS NET 2015). Since then, several private sector companies have dominated the wheat milling sector, including Wheata and Sayga. The latter is part of the large DAL conglomerate, and until the 2023 war, it supplied about 70 percent of wheat flour consumed in Sudan, including both subsidized and commercial flour (Radio Dabanga 2015). The third major player was the Seen Milling Company, which was under the NISS, the armed intelligence services, until the 2019 revolution, after which it fell directly under the SAF's ownership.³⁰ The company is also a shareholder in the SAF's United Capital Bank.³¹ Prior to the war, Seen had a large milling base in Khartoum and two mills in Port Sudan.³²

Seen's goal was to take over the wheat flour business from its private sector competitors, which experienced a market opportunity as Sudan began importing more wheat to satisfy domestic demand. The company benefited from many advantages over its competitors. Most notably, between 2016 and 2021, a preferential exchange rate to import wheat grain served as a wheat subsidy to the milling companies. This required companies to deposit their payments in domestic currency for the required amount of wheat with the Central Bank of Sudan (CBoS), and in turn, the CBoS provided the necessary foreign currency for the imports (Siddig 2016). While all three milling companies were eligible for the subsidy, the CBoS favored Seen when issuing approvals for wheat imports: "CBoS might allow Wheata and Sayga to import one month but then wouldn't approve for the following month. Seen, though, was consistently given approval to import."³³ If there was a shortfall in money to import, Seen received access to dollar financing from the SAF's Omdurman National Bank, which often did not need to be repaid. This subsidy became instrumental to Seen's growth:

Seen benefited greatly from the subsidy era, which allowed the company to establish a strong brand and develop a network of agents and distributors across Sudan. This foundation has been instrumental in helping Seen maintain its position as a top milling company, even after the conflict erupted. In contrast, Wheat and Sayga were significantly affected.³⁴

30 Interview with former Central Bank official (February 13, 2024) and former Ministry of Finance official (April 20, 2024), virtual.

31 Interview with former Central Bank official (February 13, 2024) and former Ministry of Finance official (April 20, 2024), virtual.

32 Interview with agrifood expert from domestic agribusiness conglomerate, virtual, August 3, 2023.

33 Interview with specialist from wheat milling company, virtual, September 12, 2024.

34 Ibid.

By leveraging its access to the media, Seen accused the DAL conglomerate of trying to control Sudan's food staples. At one point, DAL was compelled to shut its Sayga mills for six months and even considered exiting the wheat milling business.³⁵ As noted by one respondent, "DAL had a long battle with the government with wheat...DAL built a milling company and no one realized that the sector was growing so quickly and when the government realized that they missed the boat, they tried to do the 'nasty games'."³⁶

Horticultural development

Both the livestock trade and wheat milling are relatively low-intensity sectors where profits can be gained without sophisticated technical skills or high levels of investment in cutting-edge technology and infrastructure. In contrast, horticulture is both skill- and resource-intensive. Armed actors would only consider investing in such a sector when the potential profit is high and competition from private sector firms is low.

Despite its nutritional and agro-ecological potential, Sudan's horticulture sector has underperformed compared to neighboring countries (World Bank 2020). Among many other factors, Sudan's historical inability to meet the sanitary and phytosanitary requirements of overseas markets has limited growth and investment in the horticulture value chain (World Bank 2020).

The primary company investing in horticulture is Zadna, which was established in 1997 with significant financial backing from the former ruling NCP, the MoFEP, and the Agricultural Bank of Sudan.³⁷ The company is also part of Omdurman National Bank's shareholding network (Cartier et al. 2022). After the October 2021 coup, General El Mirghani Idris Suleiman, a close ally of General Al-Burhan, was appointed as Zadna's chairman to prevent civilian interference (Lanfranchi and Hoffman 2023). Hemedti's brother, Abdulrahim Hamdan Dagalo, also serves on Zadna's board, making it one of the rare instances where both the SAF and RSF have a presence on the same company board (Cartier et al. 2022).

Zadna has diversified its activities over time. It initially focused on agricultural construction, with an emphasis on water irrigation programs in the River Nile State. For example, the company's Zadi 1 project encompasses 1 million acres, which utilize 3,500 pivot irrigation systems to grow fodder, sorghum, and wheat and generate an estimated US\$1.5 billion in

35 Interview with agrifood expert from agribusiness conglomerate, virtual, August 3, 2023.

36 Ibid.

37 Interview with former SAF industry employee, virtual, September 11, 2024.

annual revenues.³⁸ Over time, it has expanded into the horticulture value chain, with a large nursery for preparing high-quality seedlings for citrus, banana, and mango production.³⁹ The company also houses one of Africa's largest plant tissue culture laboratories and engages in research on new seedling varieties, fruit and vegetable drying, waste management, and exports. By collaborating with European, South African, and US companies, Zadna has been working to enhance seed quality and establish demonstration farms aimed at increasing producers' technical skills and improving export quality to Gulf markets.⁴⁰

To explain why Zadna invested so heavily in horticulture, several respondents pointed to the lack of private sector engagement in the subsector: "The lack of competition with the private sector is giving this company [Zadna] an advantage in this area."⁴¹ Another interviewee noted that Zadna had the capacity to focus on horticulture at scale because it could bypass certain constraints that otherwise discouraged the private sector:

"I think they focused on fresh fruits and vegetables because the private sector wasn't really focused on this on a larger scale. There were some small companies selling seeds in the fruits sector. City Seeds had greenhouses where they were breeding and selling plants, but really the private sector wasn't even looking at this market because it really required a lot of work from the production and processing side and the logistics didn't make sense and the Port [of Sudan] has always had its issues."⁴²

Moreover, investments in horticulture were designed not only to supply domestic consumption of fruits and vegetables but also to export to the world market. The company's model has relied on partnerships with private entrepreneurs to whom they lease their land and provide a series of services, including the distribution of high-quality horticultural tissue cultures.⁴³ In turn, they can sell the horticultural products for export to generate more revenue

38 Interview with former senior Central Bank official, virtual, February 13, 2024.

39 Interviews with agrifood export from agribusiness conglomerate (August 3, 2023) and former researcher with public agricultural research body (May 28, 2024), virtual.

40 Interview with resistance committee member (January 25, 2024), former member of transitional government (January 30, 2024), and agrifood expert from agribusiness conglomerate (April 3, 2024), virtual.

41 Interview with former research with public agricultural research body, virtual, May 28, 2024.

42 Interview with agrifood expert from agribusiness conglomerate, virtual, April 3, 2024.

43 Interview with government transparency expert, virtual, July 13, 2023.

for the military:⁴⁴ “At the end of the day, their aim is to sell.”⁴⁵ Yet, as with other business enterprises run by armed actors, rather than technical professionals, who do not need to care about operational planning and expenses, mismanagement and corruption have been problematic for the company.⁴⁶

Summary and conclusions

The SAF’s and RSF’s competing yet complementary commercial interests, not only in agrifood industries but also across a diverse range of sectors, are among the key drivers of the conflict in Sudan, perpetuated by what Walter (2017) calls “external spoilers,” meaning foreign actors who prolong the civil war for access to land, water, and other resources in exchange for financing and weapons support. At the same time, Sudan’s vibrant war economy⁴⁷ is a classic example of Keen’s (2008) observation that many wars are fought more for the continued accumulation of wealth than to actually win territory or ideology, thereby providing an incentive to continue perpetuating violence rather than to sue for peace.

As the chapter shows, Al-Bashir’s efforts to create rival sources of political power with entrenched economic interests have caused Sudan’s political settlement to be especially brittle in the post-Bashir era. The SAF’s leadership increasingly has resented the growing economic power of the RSF, as reflected in the RSF’s expansion into productive economic sectors such as agriculture and banking. Moreover, the RSF’s fiscal autonomy, facilitated by external networks and its own banking infrastructure, has enabled the paramilitary group to further expand its accumulation of economic rents.

The chapter offers a novel perspective on the diverse sets of strategies used by these armed actors across different agrifood value chains to amass profits that facilitate purchasing goods and equipment for continued warfare. Capture dominates in low-complexity value chains with limited private sector activity, such as livestock trade. Here, the SAF and RSF focus on extracting profits to fund their operations without investing in upgrading. Since the outbreak of the civil war, livestock markets have been bombed multiple times and the main vaccination lab in Khartoum was destroyed. Yet, the trade has continued with an oddly synergistic relationship between the RSF and SAF, as

44 Interview with former member of transitional government (January 30, 2024) and former Central Bank official (February 13, 2024), virtual.

45 Interview with livestock expert, agribusiness platform, virtual, February 28, 2024.

46 Interview with government transparency expert, virtual, July 13, 2023.

47 Ibid.

the former buys cattle in western Sudan and then sells to SAF-affiliated companies, which in turn export herds out via Port Sudan.⁴⁸

In value chains such as wheat milling, where substantial private sector involvement exists but technical complexity remains lower, the SAF historically employed a competitive strategy. By leveraging mechanisms such as preferential access to import licenses and financing, the SAF skewed the market in its favor, disadvantaging private sector competitors. The civil war has effectively further displaced the private sector through the destruction, for instance, of Sayga's factories in Khartoum (Rickett and Sneineh 2023).

Finally, in highly complex sectors with limited private sector presence, such as the horticulture value chain, the SAF (and RSF via Zadna) adopted an innovation strategy. By investing in high-quality seedlings and tissue culture labs, they started filling a gap left by the private sector, positioning themselves as key players in a potentially lucrative value chain. But with US and EU sanctions imposed on Zadna because of the company's alleged money laundering (U.S. Department of the Treasury 2024), and given limited sales prospects due to significantly lower household incomes resulting from the war, innovation in the horticulture sector is not a priority. Ironically, at least one observer noted that due to the historical militarization of the Sudanese state, SAF and RSF businesses will be critical to resolving food insecurity when the war ends, at least until the private sector can regain the confidence of investors and build up its infrastructure and supply chains.⁴⁹

Importantly, these scenarios in livestock, wheat milling, and horticulture predominantly reflect the prewar constellation of activities and interests between the SAF, RSF, and private sector. When the war ultimately concludes, a more in-depth mixed methods analysis can be employed to identify how the conflict impacted the private sector and shifted these armed actors' business strategies and financial flows.

More broadly, the chapter has illustrated that a desire for off-budget resources to gain financial autonomy has not only been at the root of the SAF's and RSF's empire building but also led to efforts to take control of certain value chains when the level of technical complexity is low and/or the private sector is relatively absent. At least two policy implications emerge from the chapter. First, divesting armed actors from business enterprises, including those in the agrifood system, is a fundamental prerequisite for a peaceful

⁴⁸ Interviews with government transparency expert (July 13, 2023) and livestock expert, agribusiness platform, (February 28, 2024), virtual.

⁴⁹ Interview with former senior Central Bank official, virtual, February 13, 2024.

transition, as it limits opportunities for financial autonomy by armed actors that will otherwise continue to threaten the state's legitimacy. Consequently, peace settlements need to include incentives for armed actors to forfeit such activities, including through guaranteed pensions, stable and attractive salaries, and other social benefits. Countries such as Argentina and Chile that successfully reduced the military's control of the economy may serve as examples. Second, for international partners interested in mitigating armed actors' role in the economy, more creative ways to support the private sector are needed. As the findings show, the private sector is adept at higher value-added and technically advanced value chain activities. As such, technology sharing, skills exchanges, and enhanced compliance with international phytosanitary regulations can enable the private sector to maintain this advantage over armed actors and allow it to expand into lucrative areas, such as horticulture, where it has been less active.

APPENDIX 1 Distribution of informants

Affiliation	Share of sample
Agricultural private sector	30%
Unions and associations	16%
Government and public sector	26%
Civil society (including international and domestic nongovernmental organizations)	24%
Agricultural finance	4%

Note: The agricultural private sector includes a broad range of large agrifood processors, input suppliers and logistics companies, and agrifood start-ups. Government and public sector informants are former government officials who served during the transitional period before the cabinet was dissolved following the 2021 military coup.

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