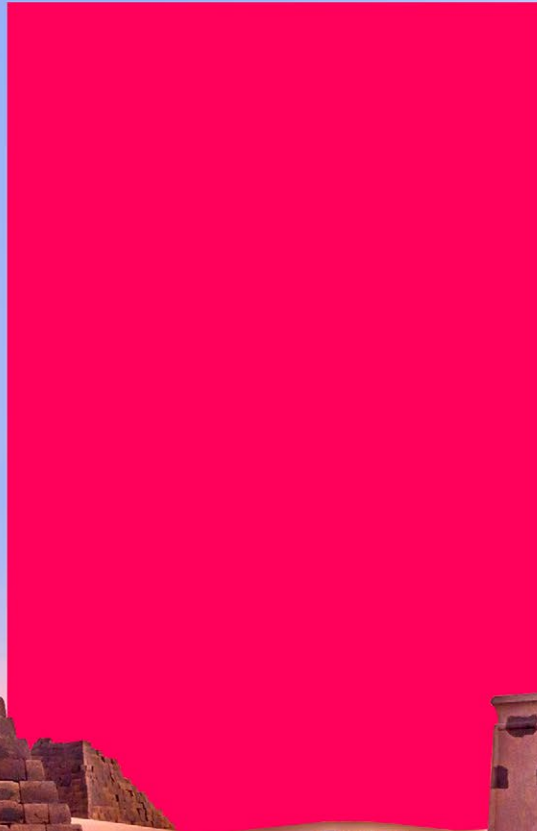


# SPOTLIGHT ON SUDAN



November 2022

N°5

## Jawhratelkmal Kanu\*

November 2022

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## Preface

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In recent years, the typical middle-class Sudanese household has shifted its eating habits from three meals spread across the day, and mostly shared with other family members, to two or one meal, if any. The average food tray would famously consist of a red sauce, a green sauce, a salad, and a staple; it has diminished to one dish rarely eaten in groups. This change not only implies urbanization trends and shifting preferences but also exposes details on the quality and quantity of food consumed by the average Sudanese person.

According to a recent report by the World Food Organization (WFP) Sudan (WFP 2022a), 15 million people, or one out of every three Sudanese, are affected by an ongoing hunger crisis. This situation was exacerbated first by the recent flooding that damaged 5000 hectares of farmland. Secondly, the recurring insurgencies across the country prohibit people from accessing and cultivating land. According to ACLED (2022), since their takeover in 2021, Sudan's military and paramilitary leadership have been struggling to sustain the country's economy and the looming hunger crisis. They are heavily involved in internal power struggles, friction with other paramilitary forces in the periphery, ongoing anti-government mobilization, and widespread intercommunal conflicts, leaving hundreds of thousands of internally displaced people. Thirdly, the increased prices of agricultural inputs, including seeds, power, and fuel, have led to inflated prices of food items, putting smallholder farmers who cultivate for sustenance and end consumers at risk of being unable to afford meals.

Furthermore, The Russia-Ukraine war has had knock-on effects on the global value chains of grains directly through trade relations and indirectly through increased prices and disruptions in global shipments; this extends to humanitarian efforts that intervene in hunger crises. The WFP (WFP 2022b), for instance, has announced that the ongoing war increases its operations by 36%, while 3.6 million beneficiaries have been added to the organization's existing 44 million beneficiaries.

## Background

Over the past few years, Sudan has been persistent in international media for its ongoing political mobilization. The spark of its ongoing revolution was student-led protests demanding a reduction in Baladi (flatbread) price in December 2018. Ever since the broader professional and worker groups joined the mobilizations and the demands spectrum expanded to include freedom, peace, and justice, and of course, toppling the Salvation (Al-ingaz) regime. Al-ingaz captured power in 1989, to “salvage” the citizens from the dire economic conditions caused by reduced subsidies, among its other ideological agenda. During this period of continuous revolting and mobilizing, the country toppled its president for 30 years, Omar Albasheer. The army leaders (Sudanese Armed Forces, SAF) and paramilitaries (Rapid Support Forces, RSF) orchestrated a coup. They sided with the persisting protestors—followed by events leading to forming of what was known as the Constitutional Document (CD), which governed the Transitional Government of Sudan (TGS). The political incubator nominated a joint front between armed forces and civilian representatives, which has supported the massive popular rise (The Forces of Freedom and Change, FFC). According to the Constitutional Document, the civilians and the army generals would interchangeably take the lead throughout the transitional period, and the period shall end with a general election.

TGS also signed the internationally endorsed Juba Peace Agreement (JPA), a peace deal with longstanding rebel groups of the Sudan Revolutionary Front (SRF). It has also engaged in peace talks with other groups still occupying areas in Darfur, Blue Nile, and South Kordofan. The transitional government has likewise negotiated new terms and structural programs with the World Bank and the International Monetary Fund (IMF). In steps towards completely lifting the 22-year sanctions on the country and lifting the heavyweights of debt and arrears payments. These efforts have qualified the country to receive the bridging support needed to join the Heavily Indebted Poor Countries (HIPC) initiative.

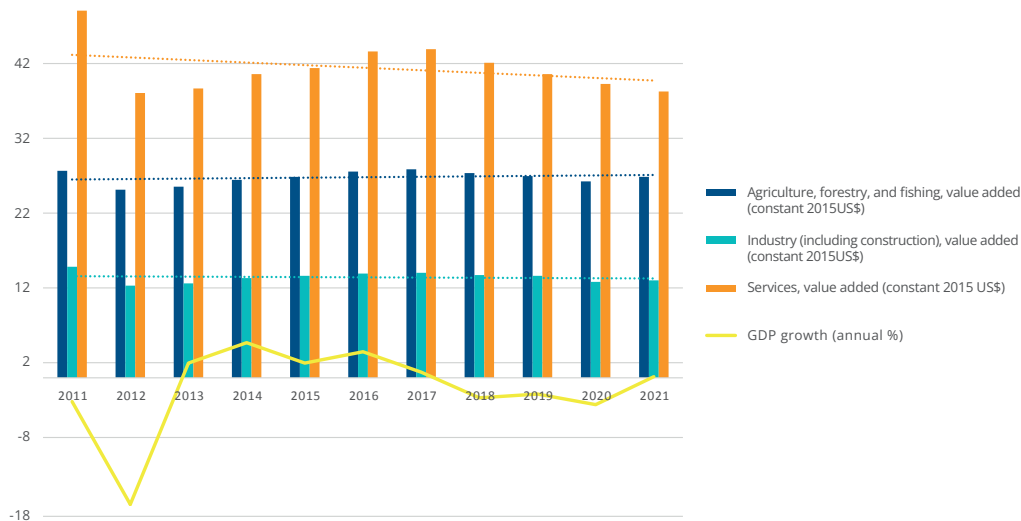
In terms of international relations, though TGS has made a breakthrough in reintegrating Sudan within the global community, it was evident that the two arms of the government needed a unified approach towards Sudan's relations with other countries. This divide surfaced when dealing with issues related to the Great Ethiopian Renaissance Dam (GERD), normalizing the relationship with the State of Israel, and preference towards engaging with the US vs engaging with Russia.

Fast forward, the short transitional period was aborted in October 2021, when the military side of the government, with the public endorsement of the JPA signatories, took over the power, modified the Constitutional Document, and arrested notable civilian members of the TGS. The reasons for this coup varied: from the military's will to control the economy through its companies and economic activities to fear of prosecution and loss of immunity or to sustain the interests and investments of its allies across the border, especially those related to gold mining. The JPA signatories argue that they supported the coup to end the FFC's neglect in implementing the peace agreement and embedded racism within the FFC. Factors related to increasing their share of power have also been behind their support.

Throughout this historical trajectory, the economy and livelihood have shaped the past four years. The trigger for the revolution in 2018 resulted from subsidy reduction and increment in bread prices, the JPA had the main focus on wealth and power sharing, and the military has been a guardian of a deeply rooted system of a parallel economy that serves the benefits of economic elite groups affiliated with the previous regime. The closure of Sudan's main port in a demonstration of dissatisfaction with TGS's performance has been one of the last straws that brought TGS to its knees. Through this intertwined relationship between political events and the economy, Sudan's micro and macroeconomic performance have been fluctuating, exacerbated by the COVID-19 pandemic, the outbreak of the Russia-Ukraine war, and the dire climatic conditions. Sudanese households have struggled to sustain their livelihoods under increased prices and a looming famine.

## Sudan's economic performance since 2019

**Figure (1): Sudan: GDP growth and components (2011-2021)**



Source: The World Bank (2022)

Dominated by its service sector, Sudan's economy has struggled to maintain stable growth over the past ten years. This weak performance is driven by structural issues within the main sectors of the economy in addition to other shocks, including the independence of South Sudan in 2011, severe annual flooding, the COVID-19 pandemic, and political instability. For instance, upon the succession of South Sudan, the country's oil production fell from 453.26 thousand b/d in 2011 to 112.45 thousand b/d in the year after (CEIC 2019). A decade after, the country is still struggling to make up for the difference while standing as the third globally in inflation rates, with external debt payments up to almost 70% of GDP (The World Bank 2022). Looking at Sudan's public financial outlook throughout the years, one cannot miss two chronic features. First, the domination of security and military expenditure over public expenditure on health, education, and other avenues of social spending, and second, dependence on rents from natural resources in comparison to agriculture and taxation revenue.

### The transitional government of Sudan: reforms in the right direction?

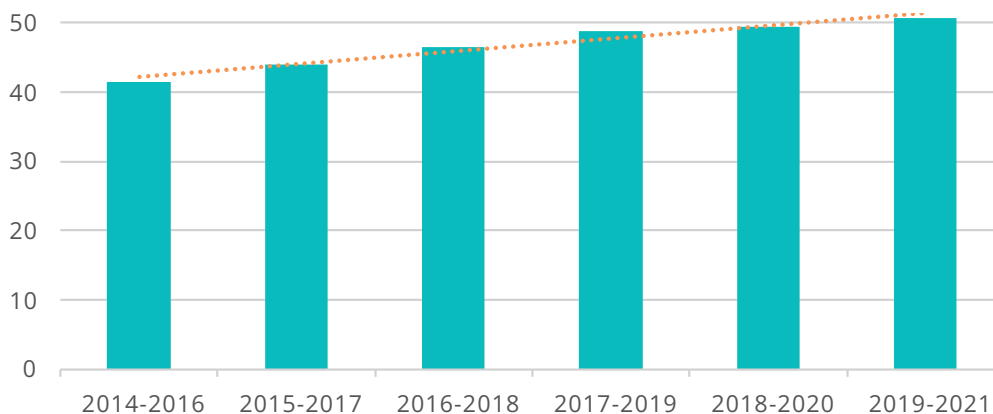
Since its inauguration in late 2019, economic performance has been on top of the agenda for the TGS; transforming the country to a "Democratic Developmental State" was the plan laid by Prime Minister Abdallah Hamdok and his cabinet. This plan included reintegrating Sudan into the global scene, utilizing the country's resources, enhancing foreign investment, and tightening the grip on the black market and all other underground and shadow economic activities. Following rounds of meetings with the World Bank Group and the IMF, Sudan qualified for the (HIPC) initiative, which put the country on a three-year track of 76% relief on its debt and a \$2.5 bn support to economic advancement.

This process of economic reforms included subsidy reforms, taxation reforms, and support programs to ease the repercussions of lifting bread and fuel subsidies. The multi-donor flagship program, Thammarat, was projected to provide an equivalent of a \$5 unconditional cash transfer per family member to the poorest 80% of the population (WFP 2022). On top of the theoretical criticism of the efficiency of unconditional cash transfers and the deflator effect, as the result of increased inflation rates, Thammarat has exposed structural issues related to the national registration systems and mobile transfers accessibility and the vulnerability of nomad groups and informal workers across the country. Nevertheless, these reforms

were halted after the coup of October 2021, followed by the suspension of multi and bilateral support to the coup government. The World Bank and the WFP have recently agreed to resume the family support program (WFP 2022).

### Sudan's poor are yet to cultivate these benefits

**Figure (2):** Sudan: prevalence of moderate and severe food insecurity (3-year average %)(2014-2021)



Source: FAOSTAT (2022)

According to the latest National Household Budget and Poverty Survey of 2014, 61% of Sudanese people were below the national poverty line, while 5.8 million were considered extremely poor. Estimations of the World Bank suggest that poverty rates have been consistently rising over recent years and rather becoming more urbanized.

Regardless of the direction of TGS's reforms, Sudan's poorest have not reaped much of these benefits; they struggle to sustain their living, especially those in more vulnerable areas. The International Committee of the Red Cross (ICRC, 2022) has recently conducted two household surveys in conflict-affected areas in Darfur; respondents indicated that they spend at least 65% of their income on sustenance, while 70% indicated that they feel poorer than the year before. Zooming to country-level statistics, the three-year average of severe food insecurity indicates that hunger in Sudan has been increasing in absolute terms and percentage.

## The underpinnings of Sudan's looming famine

Cereal grains are the most important source of calories in the Sudanese diet. Historically, most of the population depended on Sorghum as the main staple, with wheat and millet being most prevalent in the Northern and Western states. This outlook has shifted as wheat became indispensable in the growing urban centres. Overall, Sudan grows Sorghum in Millet in its rain-fed sector, while the irrigated subsector produces wheat and a sizeable amount of Sorghum (Abdelrahman, 1998). The country has been historically producing enough Sorghum and Millet but importing Wheat to redeem the gap between production and consumption, which has become an increasingly difficult task. Wheat consumption has been growing with the changing dietary habits, increased urbanization, the rising cost of importation, and ever-challenging exchange rate policies.

Additionally, local structural shortcomings have also been affecting the production of the other two main staples (Sorghum and Millet). Hence, Sudan's food security landscape has production and import deficiencies. At the same time, the country struggles to maximize the usage of its arable land fully, and global market fluctuations and exchange rate crises have exacerbated the ability to supplement production shortcomings.

### Production side

**Figure (3):** Sudan: Land Use (2021)

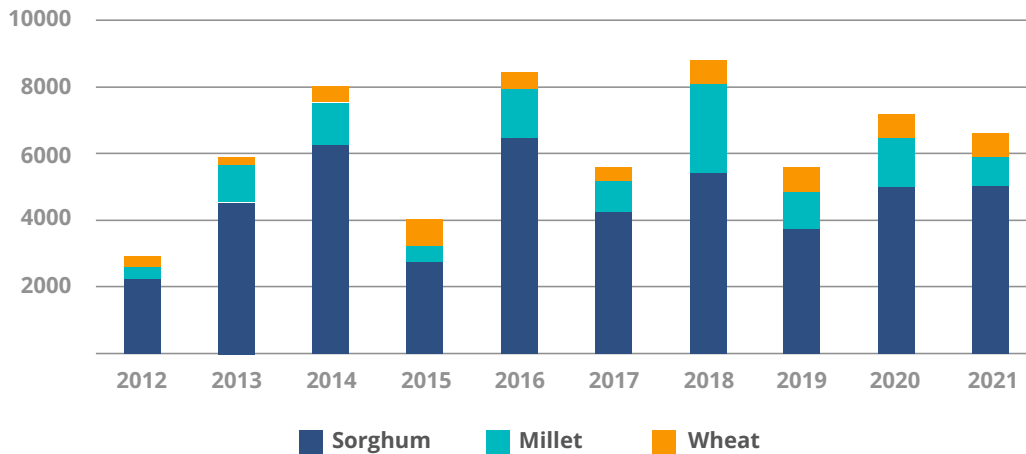


Source: FAOSTAT (2022)

In conversations with agricultural sector experts, increased prices of inputs (power and water), limited access to improved technology, and the absence of encouraging post-production policies (such as price floors and insurance) are among the reasons behind the diminishing quality and quantity of agricultural produce in Sudan. Other factors include climate change manifestations (drought, flooding) and the eroded role of the State in making production-enhancing policies. Under these critical conditions, farmers are either resorting to agriculture or shifting to more marketing-friendly crops, usually purchased by the private sector through contract farming.



Figure (4): Sudan: Cereal Production (2012-2021)

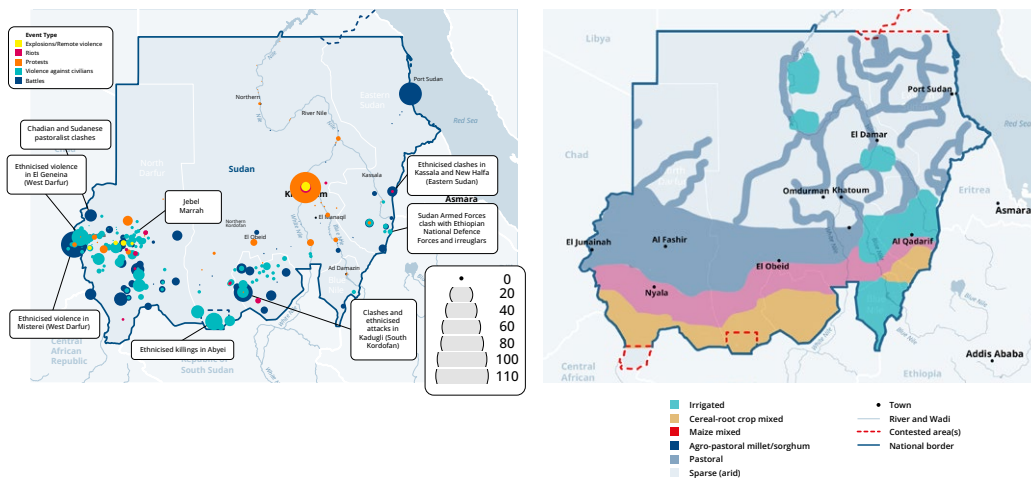


Dorosh (2021) based on estimates from USDA and FAO

In January 2022, citizens of the Northern State of Sudan staged a weeklong sit-in protesting the federal government’s lift of electricity subsidy, which directly impacted the winter harvest. Farmers who are harvesting the country’s most used cereals (Wheat and Sorghum) in the Gezira scheme and Gedarif state; have also been complaining about increasing prices of inputs and the government’s failure to purchase at the amount and prices it promised at the beginning of the season. They attribute this to the government’s deprivation of foreign funds and believe this would have a negative knock-on effect in the following seasons (VOA, 2022).

Conflict

Figure (5): Sudan: Political disorder fatalities and Agricultural land use

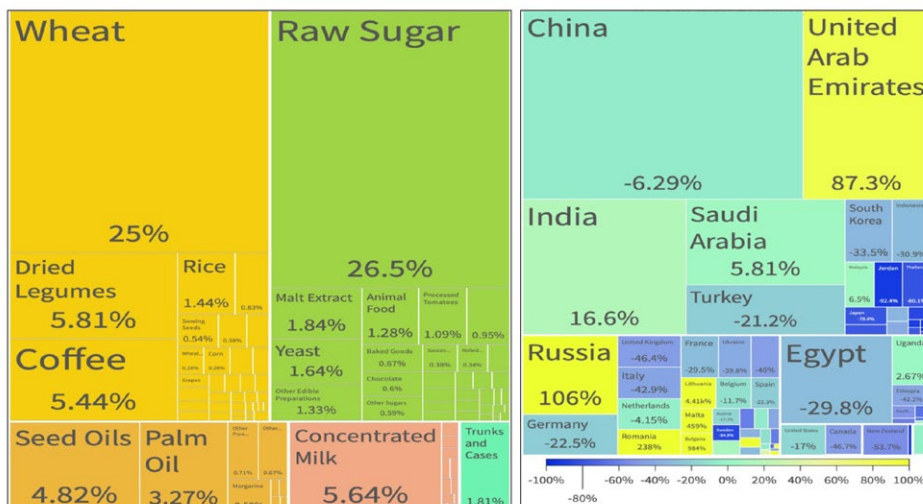


Source: ACLED (2022) and Fanack (2022)

A significant additional influence on the agricultural sector is the prevalence of violent conflict. Rural farming communities are often targets of attacks, especially in rebel group insurgencies. Communities are usually captured to supplement insurgent groups' needs or used as a pressure tool on wider communities that benefit from the agricultural produce. Consequently, those communities suffer not only from high mortality and morbidity rates but also distortions in the labor market, consumption patterns, market access, perceptions, and human behaviors. In most cases, those communities cannot access their farming land for reasons varying from insecurity to land appropriation by the new-coming insurgents. Farmers in these situations tend to replace mechanized largescale cash crops with small-scale manual sustenance produce to compensate for the displaced working force and the fact that in many communities, operating large, sophisticated machinery is also perceived to attract insurgent attacks. The maps above show the intersection between Sudan's conflict scene and cultivated land. While Sudan's rural areas depend on rotating weekly markets to exchange their produce, inter-communal conflicts and the absence of security have caused an abrupt deformation in this longstanding system. Now are not only unable to exchange their produce for money, but they also need help to supply other essential goods that are exchanged in these setups, leading to a distortion in both the amount and quality of food consumption.

Imports side

Figure (6): Sudan: food items import percentage (2020) and Product origins growth (2015-2020)



Source: Fischer (2022).

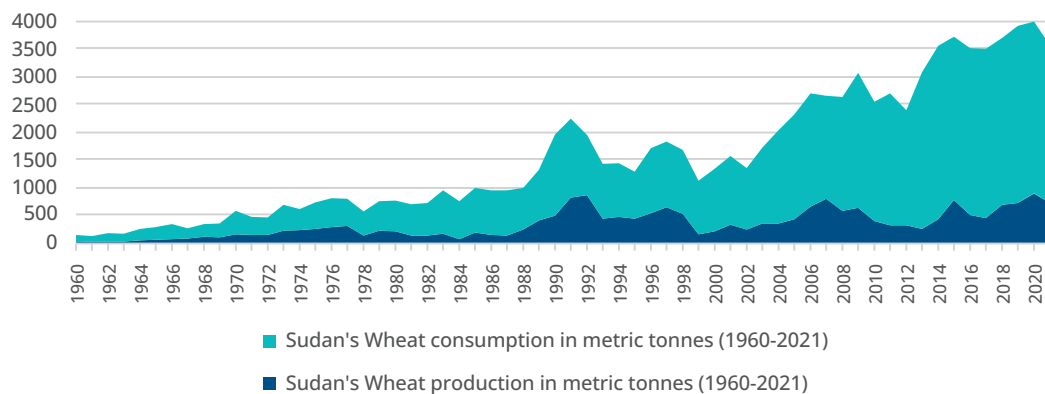
Sudan supplements its food items deficits by importing goods from the global market, this has been governed by the country's exchange rate and subsidization policies. The government has repeatedly tried to liberate the exchange rate and lift subsidies, partially or entirely. Nevertheless, these policies were always met with discontent by the Sudanese people, leading to a series of civil unrest events. A recent one was the spark of the 2018 December revolution and follow-on mobilization throughout the transitional period.

Over the past five years, Sudan's import outlook has exposed the country's foreign policy direction. For instance, as a trading partner, Russia has witnessed a 106% increase, followed by the United Arab Emirates (UAE) (87,3%); this relationship explains the coup government's rush to sustain its relationship with Russia in the wake of the Russian invasion of Ukraine. Furthermore, this outlook seems to remain in the foreseeable future. A recent report has confirmed that trading relations with UAE and Russia extend beyond consumer goods, with the latter using a continuous supply of Sudan's gold to fuel the ongoing war and the former being the largest importer (Elbagir et al., 2022).

## Sudan's Wheat trap: The case of Wheat deficiency in Sudan

Wheat, amounting to a fifth of the daily consumed calories in Sudan, has significantly driven the looming food insecurity crisis (Resnick, 2022). From one end, increased Wheat consumption was caused by the shift in dietary habits. While Wheat has been historically a staple in the Northern states of Sudan and urban centers, this narrative has been shifting over the years. The highly subsidized flatbread in the years following Sudan's independence (Cold War Era) increased its popularity among consumers. This has led to exponential consumption of Wheat (Hassan et al., 1992), the habit of consuming bread instead of Kisra (mostly Sorghum), and Aseeda (mostly Sorghum or Millet) has been a characteristic of modern-day Sudan. Sudan's cultivated area of Wheat has been falling short of meeting this growing demand, and the gap had to be filled through the global market of Wheat.

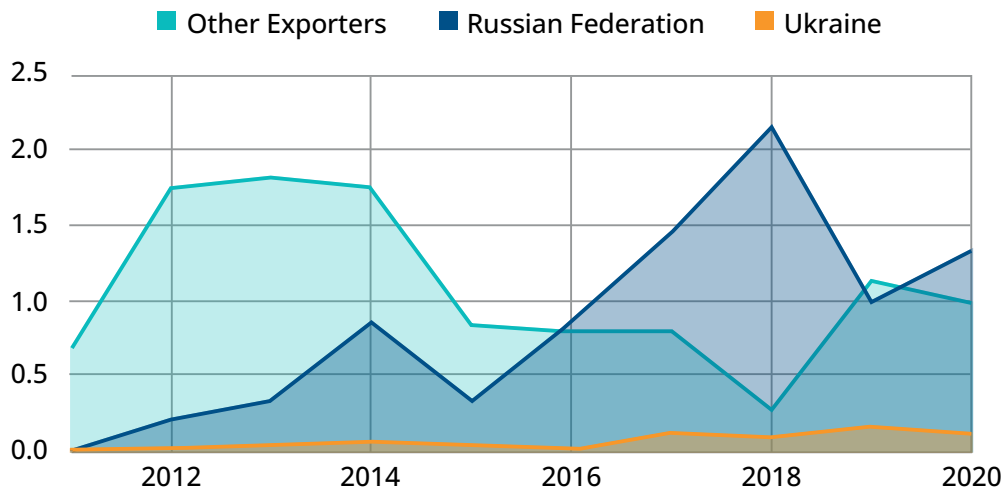
**Figure (7): Sudan's wheat trap**



Source: Index Mundi (2022)

By filling this gap from imports, Wheat in Sudan is susceptible to political economy fluctuations. One example is how the invasion of Ukraine and its preceding events have contributed to rising uncertainty regarding Wheat prices and directly affecting Sudan. In 2020 alone, Sudan imported 59%-80% of its Wheat from Russia and Ukraine combined, not to mention local production inputs such as fertilizers (Breisinger et al., 2022; Thomas & De Waal, 2022).

Figure (8): Sudan: Wheat imports



Source: UN Comtrade (2022)

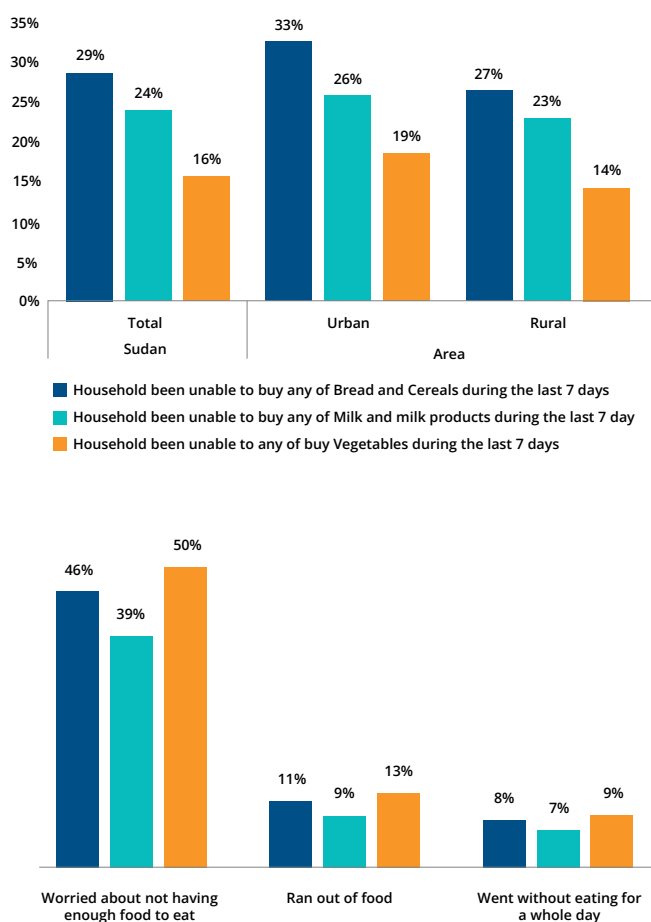
This event also forces political actors to choose between their external suppliers of Wheat. According to Thomas and De Waal (2022), Sudan’s political marketplace is exploitative, where decision-makers prioritize the gains of influential constituents over sustainable food policies. In this case, SAF and RSF; which according to Gallopin (2020); control 60% of the Wheat market, have been actively endorsing Russia’s decisions (DW, 2022) to maintain ties related to gold and weaponry trade. These moves have been slowly ending a short-lived honeymoon between Sudan and the West, including the US, which shipped 200K tons of Wheat in 2021 and pledged 420k annually until 2024 (Holleis & Knipp, 2022)

## COVID-19 Crisis

Though the country was moderately hit by the pandemic (an official death count of 4,972), the overall health situation and imposed lockdown measures have caused significant disruptions in the labor market. TGS attempted to mitigate this disruption through direct cash transfers with 390,633 direct beneficiaries, including informal sector workers, internally displaced people (IDPs), and those living in rural areas. However, this was way below Sudan’s informal economy, which employs about 65% of prime-age workers in Sudan (ILO, 2014).

These disruptions have also had direct effects on the agricultural sector. Respondents to a survey by ILO (2022) have confirmed that they either stopped working and/or had difficulty hiring seasonal workers and purchasing inputs. Some have also shifted their storage and marketing plans. This disrupted labor market has initiated a ripple effect on the ability to sustain food. The World Bank (2021) surveyed citizens from across the country who expressed concerns about their food security and ability to supply stable food. Concerns were emphasized by female respondents and inhabitants in rural areas.

**Figure (9):** Sudan: households unable to access main staples during the COVID-19 crisis, and overall food access.



Source: World Bank (2021)

## CONCLUSION

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- Sudan's food insecurity is another threat to the country's depilated structures and fractured political elite. In contrast, other factors such as the pandemic, the political turmoil, and the ongoing conflict have accelerated the food insecurity outlook; it seems impossible to overcome this crisis in isolation from its compounding elements. The current political sphere does not constitute a conducive environment to overcome those issues.
- The changing dietary preferences have also contributed to the shifts to staples that are not produced locally, making the country supplement most of its products through high-cost importation.
- Sudan's dependency on certain trading partners to supplement this deficit has proven to be a weak strategy. This dependency link increases the sensitivity of food imports to the high fluctuations in the global market; it is also safe to say that the current linkages do not necessarily serve the benefit of the people of Sudan but rather the political elite and their trading partners.
- COVID-19 has decreased farmers' incentives, reduced the labor force, and exacerbated the burden on rural communities.
- The State's reform policies have exposed the country's poorest, and the coup has shattered any direct cash transfers or input subsidies that could cushion those effects.
- In the longer term, Sudan's farming land has the potential to supplement the ongoing deficit, but the absence of favourable policies and infrastructure is a leading cause behind its underutilization.

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