

ISSUE BRIEF

THE IMPACT OF WAR ON TRADE AND MARKETS IN DARFUR

Destruction, resilience and adaptation

Introduction

This briefing note provides an overview of how trade and markets in Darfur have adapted, positively and negatively, to the conflict since full-scale war broke out in April 2023. It is focused mainly on trade and markets within the five Darfur states. It complements the SPARC brief *Darfur's long-distance trade: impact of war and Rapid Support Forces' trade embargo*. Although Darfur had already experienced 20 years of violent conflict since 2003, the nature and intensity of the current war is on an entirely different scale, now extending nationwide and fuelled by

wider geopolitical interests. This brief identifies some trends that have amplified adaptations to the conflict in Darfur since 2003, and some that are new. It is based on first-hand observation and data collected by a network of researchers across all five Darfur states who are in regular contact with traders in each of the Darfur state capitals (see Box 1). The focus is on trade and market dynamics; it is beyond the scope of the brief to capture the consequences for agricultural production and producers.



BOX 1 SUMMARY OF THE UNDERSTANDING MARKETS STUDY

This briefing note is part of a 12-month SPARC study on *Understanding markets and trade in a context of extreme conflict and humanitarian crisis, with limited access, in Darfur, Sudan*. It sets out to address three research questions:

1. How can market monitoring and data collection be adapted, with flexibility and sensitivity, to at least partially fill the information gap in Darfur – a context of extreme conflict, insecurity and constrained access – through local actors?
2. How has trade in agricultural and livestock commodities adapted, positively and negatively, to the current context of extreme conflict in Darfur, how is trade affecting the conflict, and what are the implications for social cohesion and for conflict-sensitive programming by humanitarian actors?
3. How can a deeper understanding of markets and trade in food commodities contribute to improved understanding of the severity of food insecurity in Darfur?

Direct targeting of trade and markets through violent conflict

Markets, in terms of both physical location and infrastructure, have become a target for attack by both the Sudanese Armed Forces (SAF), usually through aerial bombardment, and by the Rapid Support Forces (RSF), usually through shelling. The pattern is to attack markets under the control of the other side, usually on market days when armed fighters are known to congregate. These attacks cause a high toll in civilian deaths and injuries. This follows a pattern of attacks on public infrastructure and services across Darfur. There are numerous examples. In North Darfur, El Fasher livestock market was shelled in January 2025, killing livestock and traders, and it has barely functioned since. Other markets in and around El Fasher have sometimes been shelled on a daily basis, for example in Abu Shouk and Zamzam camps. Markets in Nyala have also been subject to repeated aerial bombardment. At the time of writing, villages and markets in Dar Alsalaam locality south of El Fasher have been subject to recent violent attacks. Whatever the motives, many civilians have been killed and some markets have closed completely, for example Dar Alsalaam livestock market. Others function periodically, sometimes for a few hours at a time, when there is no shelling.

Traded and stored commodities are a target for looting. This is a combination of unchecked criminal activity, and is also directly fuelling the war economy when armed actors are involved. As explained below, this has severely and negatively affected the movement of commodities and the cost of trade. For example, the looting of trucks

between Nyala and Ed Daein in January meant the number of trucks entering Nyala from the east was very much reduced, transport costs rose and ultimately retail prices for consumers also rose, for example for wheat flour.

Traders themselves have become a target for attack by armed groups, being robbed for cash or assets and sometimes held hostage for ransom, almost always with impunity. This has caused some traders to leave the market and others to drastically change how they operate, as explained below. At the very end of February, a major robbery of one of Nyala's merchants triggered violence in which many were killed (Darfur24, 2025).

Market network and hierarchy

There has been major disruption to the hierarchy of markets within Darfur, as some large markets have contracted or closed and others in more secure locations have expanded. This restructuring of the market hierarchy and network is also highly dynamic. For example, the markets in Zamzam camp and in Tawila replaced besieged El Fasher as major market hubs throughout 2024, but their significance declined with the shelling of Zamzam in early 2025. Within Darfur's state capitals some markets have closed, especially those in the town centres, while others in 'safer' parts of the towns have become more important. In Zalingei, for instance, traders have moved from the main market in the centre of town to Murrain and Crowley markets in the east. Certain markets have become associated with the resale of looted and stolen commodities, for example Qadira market in Nyala.

In the face of conflict and insecurity many businesses and enterprises have downsized, just as they did in response to the outbreak of conflict in Darfur in 2003 (Buchanan-Smith et al., 2013). Groundnut milling is a case in point: it is now being done as a cottage industry, mainly engaging women in towns such as El Fasher, rather than on an industrial scale. In El Geneina, the number of large groundnut mills has fallen by a third as so many businesspeople were displaced, although in Nyala there are still over 20 large groundnut mills operating.

Market infrastructure and storage

The fragility of Darfur's market infrastructure is apparent from the attacks that have wreaked destruction, particularly on market days, and also from devastation caused by fire and fighting within the marketplace. In recent weeks Nyala's markets have been badly affected.

Traders also comment on very high rental costs for premises, which many find unaffordable when profits are so squeezed.

Traders have adapted how they store their commodities, placing them out of sight for greater security. Many now store their goods in their homes rather than in

the marketplace, with the additional cost and effort of transporting them to their shops each day. Those that can afford it employ armed guards.

Sources of supply, trade flows and trade routes

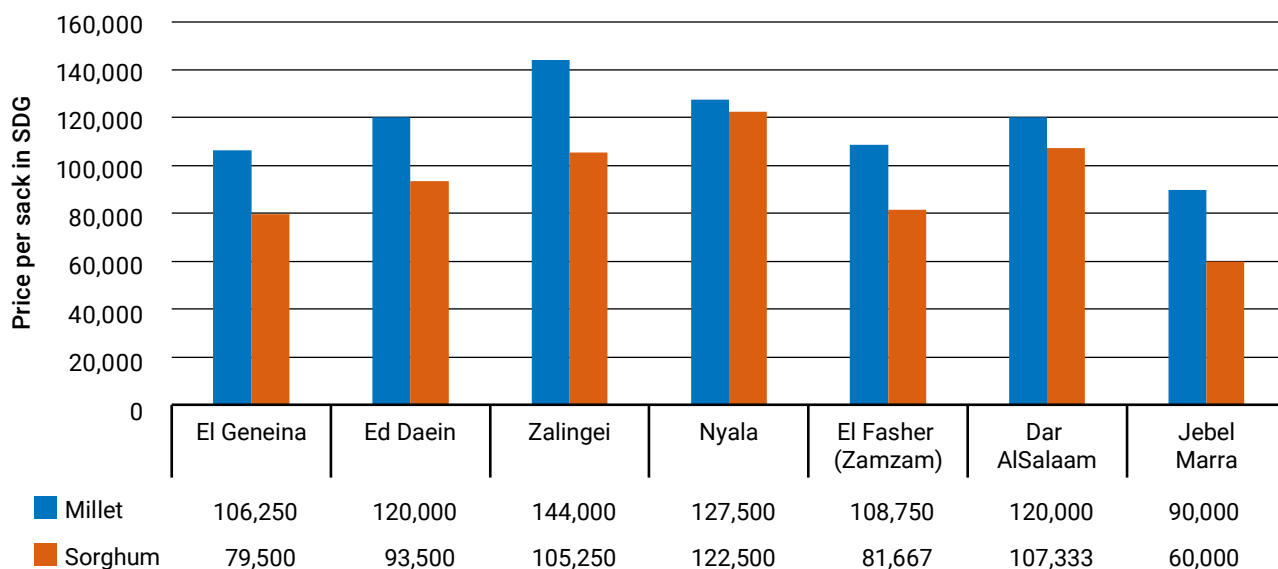
A number of major roads used for trade within Darfur have been disrupted or closed by conflict. This includes the Nyala to El Fasher road, which has been completely closed since the beginning of the war, as well as other main trade roads into and out of El Fasher – for example in recent months the El Fasher–Kebkabiya and El Fasher–Kutum roads. In these cases, the closures have been exacerbated by the RSF siege and recent tightening of control of access to El Fasher. Other trade routes may temporarily close due to skirmishes and fighting between the SAF and the RSF, for example north of El Fasher – trade routes branching both north-west towards Dar Zaghawa and north-east towards Malha. Until late 2024, there was a thriving trade route for agricultural produce from Jebel Marra to Tawila and Zamzam markets, which became a critical source of supply for El Fasher. However, attacks by the RSF on Zamzam and surrounding areas from late December onwards have closed this route between Tawila and El Fasher. The conflict-related disruption of trade routes is highly dynamic. For example, the Nerteti section of the important Nyala–Kass–Zalingei road closed for periods in December 2024 and January 2025 when there was confrontation between the RSF and the Sudan Liberation Army (SLA–Abdul Wahid). Traders are also dynamic in their response, constantly finding alternative

routes. These are usually longer and more circuitous and inevitably raise the cost of transport, as described below.

In response to the highly insecure environment, much trade in Darfur now operates over very short distances, negatively impacting market integration within Darfur.

Instead of transporting cereals from one Darfur state to another, as in the past from South and Central Darfur to North Darfur, most state capitals are now supplied from the rural area in their immediate vicinity. This can cause high price differentials between markets, for example between Jebel Marra, a major area of production, and most of Darfur’s state capitals. See Figure 1 for millet and sorghum prices in January, for all state capitals plus Dar Alsalaam and Jebel Marra. Beyond supply, there are now many factors affecting price. The surprisingly low price of millet in El Fasher market is due to low purchasing power (see section below). As described above, when security has permitted, cereals grown in Jebel Marra have been transported to North Darfur (specifically to Zamzam camp until it was shelled) and to Nyala and Zalingei markets. There is a similar pattern of short-distance trade flows of cash crops (groundnuts, sesame and *tombac*¹) to state capitals from neighbouring production areas. These are in stark contrast to Darfur’s usual long-distance trade flows – nationwide and for export – which have been so important to the Sudanese economy. Although cash crop exports continue, as described in the SPARC brief *Darfur’s long-distance trade: impact of war and Rapid Support Forces’ trade embargo*, this trade is on a much

FIGURE 1 AVERAGE PRICE OF MILLET AND SORGHUM IN DARFUR’S FIVE STATE CAPITALS, PLUS DAR ALSALAAM AND JEBEL MARRA, JANUARY 2025



Source: Authors’ own

1 *Tombac* is locally produced and processed chewing tobacco.

smaller scale, and much is now smuggled across the border. The livestock trade in some of Darfur's state capitals has also become highly localised, particularly in El Fasher market where it is mostly destined for local meat consumption.

In summary, although seasonality is still a factor affecting the availability of commodities in the market, there are now many other factors related to conflict affecting both availability and the direction of trade.

Lack of purchasing power

Before the war, the urban poor (including many internally displaced people) were heavily dependent on daily labouring for their livelihoods and incomes. This was particularly in the construction sector (such as in brickmaking and housebuilding), loading and offloading trucks in the market, and domestic work. **Since the war broke out, the market for daily labouring has totally collapsed in El Fasher, with a devastating impact on purchasing power.** The displaced and other poor households are now dependent on begging and local charity, including communal soup kitchens known as *takaya*. Many now eat only one meal per day, usually bread, which can be eaten on its own or with sugar. They rarely purchase local cereals as they do not have the means to cook anything with millet or sorghum. When the poor have left El Fasher for neighbouring rural areas this is usually for safety and to escape bombardment, although many of those rural areas have since come under attack. This contrasts with pre-war patterns where poorer households chose to leave urban areas during periods of acute food insecurity to join family in rural villages where food and social support were more readily available.

In other state capitals the market for daily labour has also been badly affected, although it has not collapsed entirely. For example, there is still some construction in Nyala and therefore limited daily labouring opportunities; there has also been an increase in market gardening around Nyala as there are so few other income-generating activities. In Ed Daein the market for daily labouring appears slightly more buoyant than in other state capitals, with a recently agreed increase in daily wage rates for loading and unloading in the market. In Zalingei in Central Darfur, those looking for work are reported to have migrated to Chad. The purchasing power of agricultural producers in rural areas is also affected by low prices and limited market opportunities. It was beyond the scope of this project to explore this in detail.

Regulation of markets

In **RSF-controlled areas** licences are no longer issued for trading. Although this reduces one cost for traders, taxation rates are reported to be extremely high compared with the pre-war period. In Nyala, pre-war the annual licence cost between SDG 7,000 (Sudanese pounds) and SDG 10,000, with monthly taxes between SDG 500 and SDG 1,000, totalling around SDG 22,000 per year. Now, traders in Nyala must pay around SDG 5,000 in taxes per week, totalling SDG 260,000 (\$108)² per year. However, taxation by the RSF is neither predictable nor systematic; it is highly personalised depending on the whim of the individual 'tax collector' and the respective trader's relationship to him. This is pushing some traders out of business. In Nyala's markets, taxes are collected from all traders (including petty traders) on a weekly basis and used to pay RSF soldiers. The *borsa* (commodity taxation point) is still functioning for goods brought into and transported out of Nyala. However, the RSF has imposed a ban on goods being traded between Darfur states and out of Darfur.³

In **SAF-controlled areas** such as El Fasher, it is reported that taxes are no longer being collected by the local authorities from traders in town, due partly to the weakening of local government and partly the collapse in economic activity.

The high costs of trading, especially for transport of commodities

The costs of trading in Darfur have increased exponentially, due to:

- very high transport costs, which include fees paid to military escorts and vastly increased fuel prices (a twelve-fold increase in the cost of petrol in El Fasher compared with pre-war)
- the high level of (mostly informal) checkpoint fees, paid to any/all of the respective armed groups (whether SAF, RSF or SLA), often justified as 'paying for security', and the numerous checkpoints along the main trading routes⁴
- local and often unpredictable taxation (see above)
- the time it now takes to transport commodities between Darfur state capitals⁵
- the high risks associated with trade and the possibility of an entire shipment being looted and stolen.

2 The current exchange rate on the black market, which is used by traders, is approximately \$1 = SDG 2,400 (Sudanese pounds).

3 See SPARC brief *Darfur's long-distance trade: impact of war and Rapid Support Forces' trade embargo* for analysis of how this has impacted cross-border trade.

4 Between El Geneina and Zalingei, for example, the cumulative checkpoint fees are SDG 77,000 (\$32) per truck, with approximately 20 checkpoints along the route. This represents almost 7% of the total freight rental for small trucks, almost 5% for medium trucks and 2% for large trucks, respectively.

5 Between Ed Daein and Nyala, for example, trucks now take 12 hours rather than eight to navigate the checkpoints.

Table 1 shows the costs of transporting *tombac* and cereals to Nyala market over very short distances within Darfur. In the examples given, transport costs represent 16% of the final retail price for *tombac*, and just over 20% of the final retail price for millet and sorghum in Nyala market. In North Darfur, transport costs for millet and *tombac* over a 70–80 km distance, from Tabit to El Fasher, have increased four- to five-fold compared with pre-war prices.

Traders are making numerous adaptations in response to the conflict, all of which further increase costs.

These include:

- using longer and more circuitous routes to reach Darfur’s state capitals and other markets, to avoid the main roads and the risk of looting
- making greater use of small vehicles rather than trucks to transport commodities in smaller quantities, also to reduce risk
- livestock traders trekking animals in small numbers to reduce the risk of losing their entire capital
- using horse and donkey carts and motorbikes to transport small quantities of goods, rather than vehicles and trucks, again to reduce the risk of looting and major losses. In El Fasher no large trucks have entered the market since November 2024. This is due partly to insecurity but also to the high price of fuel and reduced trade flows to the besieged town.

Cash, liquidity and payment issues

Trade in Darfur is negatively impacted by major cash and liquidity issues, including the lack of banking facilities. This has created a *souq el gurush* (a market in money), especially in some state capitals such as El Fasher and Zalingei. Cash shortages appear to be less of an issue in the state capitals of Nyala and Ed Daein, where trade is more buoyant and therefore attracts a higher flow

of cash. This is particularly true in Ed Daein, where the relative stability of East Darfur has attracted money and capital from neighbouring states that are more affected by the war. In all parts of Darfur, however, there is a high risk associated with holding or carrying cash, in terms of being attacked and robbed. For these reasons many people prefer to use the mobile banking app *bankak*, although it is only available to those with an existing bank account and is associated with high commission rates, ranging between 10% in Zalingei and 30% in Nyala. Interestingly, the livestock trade within Darfur appears to operate predominantly in cash, unlike the trade in other commodities, where *bankak* is preferred. This is partly a reflection of how the livestock trade operates, with livestock producers having to be paid in cash. It is also a reflection of who is trading livestock: often members of the RSF or those aligned with the RSF who control livestock exports.⁶ Usually armed, they are less fearful of holding large amounts of cash and are less likely to have bank accounts.

In border markets in Darfur, particularly in West Darfur, three different currencies are being used. First and foremost is the West African franc (CFA), second is the Sudanese pound (SDG), and third is the occasional use of the US dollar. The main reason for the predominance of the CFA is the collapse in value of the Sudanese pound and the scarcity of exports out of Sudan, which is reported to be an incentive to currency traders to hold as much foreign currency as possible, particularly the CFA and US dollar.

As in the years after the outbreak of conflict in Darfur in 2003, there is a high dependence on trust and social connections in terms of how payments are made and where credit is granted. For example, when the livestock market was still operating in El Fasher, livestock traders were selling to butchers on credit, not receiving payment for the animals they sold for at least a couple of weeks until the butcher had sold all the meat.

TABLE 1 COSTS OF TRANSPORTATION INTO NYALA MARKET, JANUARY 2025

Commodity	Trade route	Cost of transportation + taxes in SDG per sack				Final retail price (SDG/sack)
		Truck rental	Taxes	Checkpoint fees	Military escort	
Tombac	Shengil Tobai to Nyala (110 km)	10,000	15,000	5,000	5,000	212,500
Millet and Sorghum	Gareida to Nyala (80 km)	7,000	10,000	5,000	5,000	127,500 for millet 122,500 for sorghum

Source: Authors’ own

⁶ See SPARC brief *Darfur’s long-distance trade: impact of war and Rapid Support Forces’ trade embargo* for analysis of how this has impacted livestock trade.

Trader profiles and deals

Most large-scale and better-off traders have left Darfur.

Many have left the country, some of them have relocated their businesses and are now trading from safer locations outside Sudan, including in Egypt and Chad. The impact has been to push the burden of risk down the market chain to smaller traders, especially those operating directly from the worst conflict-affected parts of the country. They bear the risk of transporting goods into and out of Darfur to safer locations, and therefore the risk of looting and loss. This is the same pattern that occurred in Darfur in the early 2000s when large-scale traders from Central Sudan closed their offices in Darfur, withdrawing to the safety of Omdurman, with the consequence that Darfuri traders ended up shouldering more of the risks and conflict-associated costs of transporting goods from high-risk areas to safer locations.

Many traders have also left the market, particularly if they lost their capital through looting early in the war. There continues to be a steady exit of traders from the market. For example, the number of livestock traders in El Fasher, where they suffered major losses during the recent shelling of the market, has dropped from around 30 in early December 2024 (when there were over 1,000 head of cattle passing through the market) to a handful of traders by February 2025 (when the supply of cattle had almost dried up). Even in the more buoyant market of El Geneina, traders are experiencing weak profit margins and erosion of capital, pushing some into bankruptcy. Some traders have turned to farming instead.

Traders who have remained in business have to be highly adaptable and opportunistic. In Zalingei, for example, a single trader may be working as a retailer, wholesaler and street vendor simultaneously – wherever there is an opportunity to do business profitably. Some traders who used to specialise in commodities such as clothes and manufactured goods are now switching to agricultural trade, as supplies of the former have dried up. As the construction industry has stalled since the war began, traders in states such as Central Darfur have shifted their businesses from building materials to imported fuel from Chad, which is in high demand and offers better profit margins.

For certain commodities and in certain markets (e.g. Nyala), ethnic allegiance to different armed groups influences the ability to trade, particularly over longer distances and where trade is more profitable. Wherever there is substantial money to be made, the warring parties themselves are likely to be engaged.⁷

Women are still playing a key role in trade, in sectors they have long dominated such as petty trading in cereals and the retail trade in vegetables and fruit. In some markets their numbers have increased, for example in Nyala, in Zalingei, and in El Geneina where women are estimated to represent around 90% of retailers (mostly petty traders). In the markets in Abu Shouk and Zamzam camps, women dominate the trade in cereals, which is now on a very small scale. This reflects the lack of other income-earning opportunities, particularly daily labouring. In the current conflict, women have stepped in to fill some critical trading gaps. They often transport small quantities of goods by donkey, sometimes across conflict lines, for example bringing wheat flour into El Fasher from the rural vicinity where truckers prefer to offload, or operating cross-border trade between Chad and Sudan. They are usually subject to fewer inspections and may even enjoy a lower tax rate than men. Their movement in small groups is generally regarded as less risky than for men, who are accused of supporting one side or the other and liable to be shot. But women are also at risk of harassment and sexual abuse, and can thus end up putting themselves more at risk by performing some of these roles.

Conclusion: destruction, resilience and adaptation

This brief demonstrates the substantial changes being made to the functioning of trade and markets in Darfur since the war began, as market infrastructure has been destroyed and trade links disrupted. Overall, market capacity appears to have shrunk as large-scale traders have left the region, other traders have gone out of business, and the RSF controls trade where there are significant profits to be made. The costs of transport and trading have risen substantially. Insecurity and conflict dynamics have triggered a loss of market integration. Some state capitals, particularly El Fasher, are operating as increasingly isolated markets, also affected by a major loss of purchasing power of the population. Although the entrepreneurship and resilience of Darfuri traders is well known, they are now operating in and adapting to the toughest environment they have yet encountered. Many of those adaptations have further raised the costs of trade, as have aspects of the war economy, including checkpoint fees and taxation. Ultimately it is producers who suffer from a contraction of market opportunities, and consumers who bear the cost of higher food prices.

⁷ See SPARC brief *Darfur's long-distance trade: impact of war and Rapid Support Forces' trade embargo*.

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