

# Structural Stagnation: Sudan's Agrarian and Informal Labor Market

## Labor Market Already under Stress in Sudan Prior to 2023 Civil War

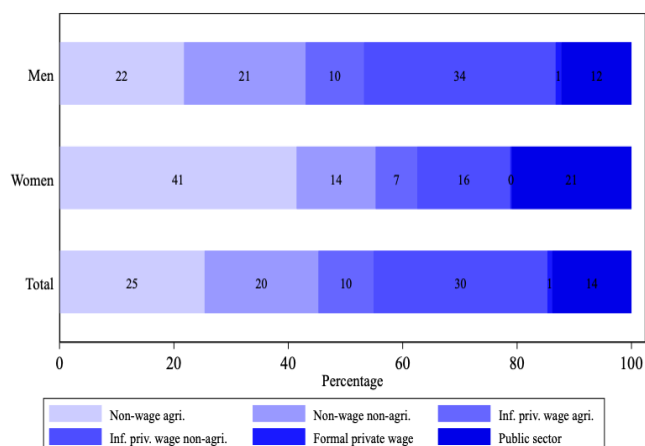
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### Topic at a Glance

Sudan's last labor force survey was in 2011 and its last nationally-representative household survey was in 2014. This brief reviews the results of the publicly available Sudan Labor Market Panel Survey 2022, the first nationally-representative household survey since 2014, covering an array of labor and human development topics. These data preceded the 2023 civil war and provide a baseline for understanding the state of Sudan's labor market pre-conflict. Sudan's labor market in 2022 continued to be primarily agrarian and informal. Only 35% of working-age adults were employed (59% of men and 12% of women). The unemployment rate was 8% (as a share of the labor force, 7% for men and 15% for women). A large share (39%) of employment was in agriculture, 45% of employment was in non-wage work, and aside from wage work in the public sector (14% of employment), the vast majority of employment was informal (98% of private sector wage work was informal). Thus, even before the 2023 civil war, the Sudanese labor market struggled with low employment rates and high rates of vulnerable employment.



Caption: Distribution of employment statuses (percentage) by sex, employed individuals aged 15-64, Sudan Labor Market Panel Survey 2022

### New Insights

Prior to the Sudan Labor Market Panel Survey (SLMPS) 2022, Sudan's last nationally-representative labor force survey was in 2011 (Ministry of Human Resources Development and Labour 2011) and its last nationally-representative household surveys were in 2014 (Central Bureau of Statistics (CBS) and UNICEF Sudan 2016; Statistics Department (ECST) Economic & Social Statistics Division, African Development Bank Group 2018). Sudan's Central Bureau of Statistics (CBS), in partnership with the Economic Research Forum (ERF) and supported by GLM | LIC and World Bank funding, undertook the SLMPS in 2022. This data collection effort had to overcome a number of challenges, ranging from political instability in Sudan to the lack of a nationally representative sampling frame (Krafft and Assaad 2023; Krafft, Assaad, and Cheung 2024).

The SLMPS 2022 data are now publicly available, and fueling a wealth of research, both working papers and a forthcoming report undertaken by CBS in collaboration with ERF and Sudanese researchers. Research to date has highlighted a number of important issues with Sudan's labor market and society as of 2022, including (Krafft et al. 2023; Assaad, Krafft, and Wahby 2023; Ebaidalla and Rakhy 2024; Assaad, Jamkar, and Krafft 2024; Sieverding 2024; Assaad, Krafft, and Wahba 2024; Krafft and Moylan 2023):

- Labor market outcomes showed economic strains in 2022:
  - o The labor force participation rate was 38% (14% for women, 63% for men).
  - o Only 35% of working-age adults were employed (59% of men and 12% of women).
  - o The unemployment rate was 8% (as a share of the labor force, 7% for men and 15% for women).
  - o Although women were rarely employed, they were often engaged in care work or agricultural production for their households.
  - o Demographic pressures on the labor market are likely to continue

given the large youth population, high fertility rates, high desired fertility, and low rates of contraceptive use.

o A large share (39%) of employment was in agriculture. Note that this includes some employment in private formal wage and public sector employment, which are not disaggregated by agriculture in the Figure.

o Almost half (45%) of employment is non-wage work (see Figure).

o Aside from wage work in the public sector (14% of employment), the vast majority of employment is informal (98% of private sector wage work is informal).

o Entry into the labor market worsened and slowed starting with political crises in 2018 and 2019, even before the recent conflict.

• Sudan's education system was already struggling in 2022:

o Net enrollment rates were 51% for primary school.

o Net enrollment rates were 31% for secondary school.

o Net enrollment rates were 13% for higher education.

o There were not gender disparities overall in school enrollment.

o Enrollment rates were much lower in rural areas than urban areas (for instance, 74% primary net enrollment rate in urban areas vs. 43% in rural areas).

• Sudan was struggling with conflict and displacement for decades prior to the 2023 civil war. In the SLMPS 2022:

o Camp-based refugees and especially internally displaced persons (IDPs) were very deprived on nearly every dimension of their welfare.

o Camp-based refugees received substantially more social assistance than camp-based IDPs.

o Refugee households (non-Sudanese, primarily South Sudanese but also Eritreans, Ethiopians, and others who had fled to Sudan) along with camp-based IDP households were particularly likely to have female heads.

o IDPs who worked tended to do so in agricultural self-employment or particularly vulnerable forms of wage work.

2023. The civil war has made implementing policies and programs to support the population increasingly difficult, with a myriad of pressing humanitarian needs. Approaches such as digital cash transfers are being piloted in Sudan (Abay et al. 2025), although, as the SLMPS highlighted, the reach of digital access is limited (Krafft and Moylan 2023).

Agricultural support interventions may also be particularly valuable given the reliance of the population on agricultural livelihoods. For instance, a small-scale vegetable input support program with asset transfers in Syria improved the food security of households during conflict (Baliki et al. 2024). Given limitations on the availability of vegetables and increases in prices (Siddig et al. 2025), this could be a particularly valuable approach in Sudan.

## Limitations

The SLMPS 2022 data provide an important update on the state of the labor market in Sudan relative to the last labor force survey in 2011 (Ministry of Human Resources Development and Labour 2011) and last household surveys in 2014 (Central Bureau of Statistics (CBS) and UNICEF Sudan 2016; Statistics Department (ECST) Economic & Social Statistics Division, African Development Bank Group 2018). However, the civil war has undoubtedly deeply affected the economy, society, and labor market in myriad ways. During the conflict, in-person, nationally representative surveys have not been feasible, but phone surveys have been undertaken (IFPRI and UNDP 2023, 2024). Mobile phone ownership in Sudan is less than universal – per the SLMPS 2022 only 46% of adults own a mobile phone (Krafft and Moylan 2023) – leading to selected and potentially biased samples from phone surveys. These studies have often used SLMPS 2022 data as a pre-conflict baseline for how outcomes have been evolving during conflict (Ahmed et al. 2024).

When the conflict ends, the SLMPS can be used to benchmark goals for recovery efforts. However, conditions in Sudan have profoundly changed since the SLMPS 2022 as a result of the conflict. For instance, nearly 12 million people have been forcibly displaced as of November 2025, with more than 4 million of those displaced outside Sudan (UNHCR 2025). As well as a need for peace, recovery efforts will require new data on the manifold and multiplied challenges facing Sudan.

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## Policy Recommendations

Sudan's population was economically vulnerable and heavily reliant on agriculture even prior to the conflict that began in