



AGRICULTURE AND AGRO-PROCESSING IN SUDAN

Rapid supply chain analysis in South, Central, East and West Darfur

JUNE 2026

Key Findings

- Agricultural inputs are available in East, West, South and Central Darfur but at high prices, leading farmers to reduce their cultivated area.
- Input supply chains are now dominated by independent traders who source to order: storage and repositioning are highly limited due to security risks and lack of credit.
- Medium and large-scale agro-processing has collapsed in East, West, Central and South Darfur due to capital loss and displacement; small-scale oil pressing and milling are not sufficient to meet market demand leading to increased dependence on imports of processed goods and exports of raw commodities
- Lack of financial services and associated liquidity shortages are a key barrier to the recovery of agriculture and agro-processing in East, West, Central and South Darfur.

Background and Rationale

In April 2023, civil war broke out in Sudan between the Sudanese Armed Forces (SAF) and the paramilitary Rapid Support Forces (RSF), disrupting communications, agriculture, markets and public services and leading to the world's worst humanitarian crisis¹. As of May 2026, the country is mainly divided into two parts: most of the West is controlled by the RSF and its associated coalition Ta'asis, and most of the East is controlled by SAF and the Sudanese government.²

The Darfur region was the center of intense fighting in the early stages of the war. Now, except for North Darfur and small pockets of unrest in other Darfur states, the majority of Darfur (South Darfur, Central Darfur, East Darfur and West Darfur) has experienced relative stability³, allowing for the return of localized governance and markets. Darfur remains largely economically isolated from SAF-controlled areas of Khartoum and Eastern Sudan, where the majority of agri-business is concentrated,⁴ but little is known about how systems for agriculture and food processing in Darfur have adapted to this isolation since the outbreak of the civil war.

Methodology

This rapid assessment aims to map supply chains for agricultural inputs and agro-processing in East Darfur, West Darfur, South Darfur and Central Darfur. A secondary data review and 7 key informant interviews were conducted between 25 May and 10 June 2026.

Secondary Data Review

The secondary data review (SDR) was conducted using the Vera Humanitarian Copilot platform; an agentic AI platform drawing from humanitarian reporting, security data and local news sources. An iterative process was used to refine search prompts for the secondary data review. The Vera platform was used to search for all data regarding "agriculture, agro-processing, food processing and markets" published between April 2023 and June 2026. A manual SDR was conducted to verify and complement the Vera platform results.

Key Informant Interviews

Seven Key informant interviews (KIIs) were conducted between 4 and 10 June 2026. Key Informants included:

- Three Mercy Corps staff engaged in livelihoods, markets or agriculture programming in the target area
- Four market actors such as traders, chamber of commerce and market committees and processing cooperatives in the target area.

¹ United Nations Office for the Coordination of Humanitarian Affairs (UNOCHA): [Sudan Humanitarian Needs and Response Plan 2026](#); March 2026

² Crisis Group: [Divided Sudan, Elusive Peace](#); April 2026

³ ACLED: [Conflict Database](#)

⁴ Norwegian Refugee Council (NRC): [Market Support Assessment, Nyala \(South Darfur\)](#); February 2026

Challenges and Limitations

Due to the short time frame for this assessment, the results are based on a relatively **small number of Kils**. Therefore, while this report contains ground-level insights to the agricultural and agro-processing sectors in Darfur, it should not be considered a complete picture.

Key Informants were engaged in work which spanned all four target states in the assessment; however the majority (and all market actors) were **based in Central Darfur**. Mercy Corps programming also spans Central and South Darfur. Information about Central and South Darfur is therefore more detailed than for other states.

Results:

Overview of Secondary Data

While there has been some research into the state of markets, and mapping of specific supply chains, in the assessed area (Central, South, East and West Darfur) in recent months, there is relatively little available information about agro-processing and agricultural input supply chains in the assessed area.

Reports indicate that **before the outbreak of civil war in 2023**, agriculture in the Darfur region was mainly rain-fed and small-scale, compared to the more mechanized irrigated and large-scale farms of some central and Eastern states. Markets in Darfur were well-connected with international trade routes into the Central African Republic and Chad.⁵ Agro-processing was heavily concentrated in Khartoum, however, some agro-processing firms had a presence in Darfur, particularly in Nyala, South Darfur.⁶

In the **early stages of the conflict**, humanitarian reporting documents near total collapse of the agricultural sector in Darfur due to mass displacement and the destruction and looting of crops, markets and agricultural equipment.⁷ East, Central, South and Western Darfur suffered the greatest loss in staple crop production in the 12 months after the beginning of the conflict, losing between 14 and 21% of sorghum and millet production compared to the previous year.⁸ Agri-processing firms also reported looting of warehouses in Nyala.⁹

Transportation through Darfur remained highly constrained during this period, with several reports of attacks on aid convoys.^{10 11}

⁵ ACAPS, November 2025: [SUDAN Economic impacts and emerging trends in West and Central Darfur](#)

⁶ Kirui, Oliver K.; Siddig, Khalid; Abushama, Hala; and Taffesse, Alemayehu Seyoum. 2023. Armed conflict and business operations in Sudan: Survey evidence from agri-food processing firms. Sudan SSP Working Paper 11. Khartoum, Sudan: International Food Policy Research Institute (IFPRI). <https://doi.org/10.2499/p15738coll2.136835>

⁷ ACAPS, November 2025: [SUDAN Economic impacts and emerging trends in West and Central Darfur](#)

⁸ Food and Agricultural Organisation (FAO), December 2024: [Sudan | Damage and Loss in the Agriculture Sector: Preliminary Analysis](#)

⁹ Kirui, Oliver K.; Siddig, Khalid; Abushama, Hala; and Taffesse, Alemayehu Seyoum. 2023. Armed conflict and business operations in Sudan: Survey evidence from agri-food processing firms. Sudan SSP Working Paper 11. Khartoum, Sudan: International Food Policy Research Institute (IFPRI). <https://doi.org/10.2499/p15738coll2.136835>

¹⁰ United Nations News, June 2024: Sudan: [UN food convoy attacked, supplies looted amid worsening crisis](#)

¹¹ International Committee of the Red Cross, May 2024: [Sudan: Two ICRC drivers killed by gunmen](#)

Reports from **the last twelve months** have tracked the adaptation of markets and agriculture from near total collapse in the early stages of the war to an adapted system which is heavily import-dependent and hyper-localized.¹² From February to May 2026, the target area was estimated to be in acute or emergency food insecurity according to the IPC, pointing to dysfunction in the food and agriculture system.¹³

Local news reports point to the isolation of the Darfur agricultural market, with usual flows of livestock from Darfur to eastern Sudan blocked.¹⁴ The same report highlights high transportation costs due to fuel price rises and road closures.¹⁵ With trade routes blocked along the SAF-RSF front line, reports in Darfur highlight increased reliance on international import routes from Chad, the Central African Republic, South Sudan and Libya.¹⁶ Notes from humanitarian cluster meetings indicate that movement across the SAF- RSF border is possible via two convoy routes from eastern Sudan into Darfur: one from Al-Dabbah and one from Kosti into South Kordofan.¹⁷

Most recent reports have focused on the administrative center of Nyala in South Darfur. These reports paint a picture of a heavily constrained agricultural sector where agricultural production is limited by lack of access to inputs and credit,¹⁸ and processing of key commodities such as sorghum¹⁹ and soap²⁰ have severely diminished. In the Nyala market reports indicate a general collapse of large wholesalers and manufacturers, and the emergence of independent traders as the key actors in importing and distributing commodities. The Nyala Chamber of Commerce was reported to have a facilitation and dispute resolution role, albeit with a weakened position.²¹

Primary data analysis:

KI responses were coherent with secondary data sources, suggesting that the supply chain dynamics across the assessed area reflect those reported in Nyala. The responses of KIs are summarized below; where information is lacking this has been supplemented by secondary data.

¹² ACAPS, November 2025: [SUDAN Economic impacts and emerging trends in West and Central Darfur](#)

¹³ Integrated Phase Classification (IPC), May 2026: [Sudan: Acute Food Insecurity Situation for February–May 2026](#)

¹⁴ Dabanga Sudan, May 2026: [Eid sheep prices expose warped economics of Sudan war](#)

¹⁵ Dabanga Sudan, May 2026: [Eid sheep prices expose warped economics of Sudan war](#)

¹⁶ Norwegian Refugee Council, February 2026: [Market Support Assessment \(Nyala - South Darfur\), February 2026](#)

¹⁷ OCHA/WFP: Logistics Cluster: [Sudan Operation – Coordination Meeting Minutes \(13 May 2026\)](#)

¹⁸ FAO. 2026. Sudan: [Emergency and Resilience Plan, 2026–2028](#). Rome.

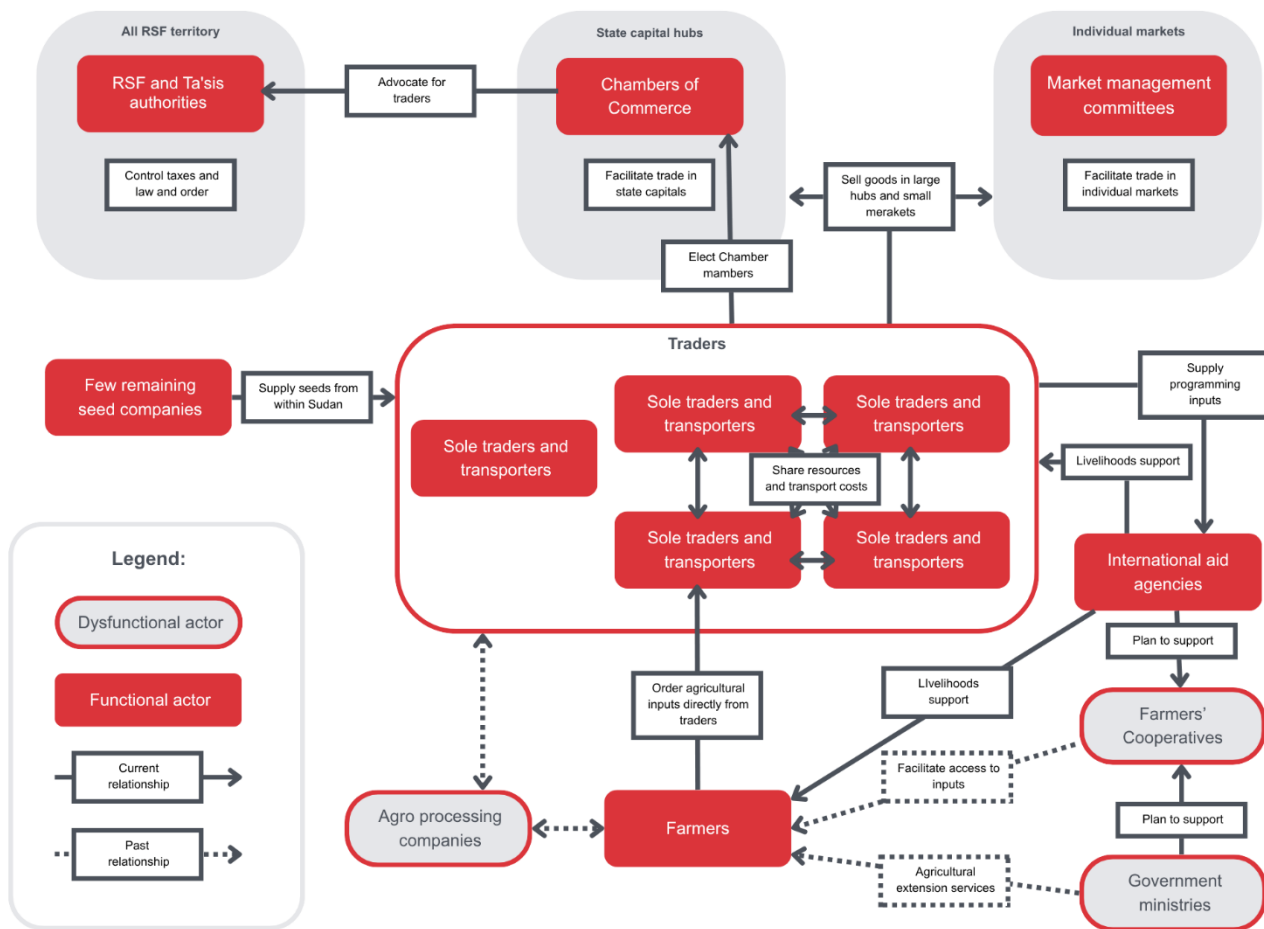
¹⁹ IMPACT Initiatives, March 2026: [Sudan Supply Chain Analysis Sorghum Supply Chains in Khartoum and South Darfur](#)

²⁰ IMPACT Initiatives, April 2026: [Sudan Supply Chain Analysis Laundry Soap Supply Chains in Khartoum and South Darfur](#)

²¹ Norwegian Refugee Council, February 2026: [Market Support Assessment \(Nyala - South Darfur\), February 2026](#)

Actor mapping:

KIs reported that the supply chains in East, Central, South and West Darfur have become individualized and relationship-based. Although some governance bodies are present and hold some influence, traders rely mainly on trusted personal relationships to gain access to credit, information, security and to bypass import restrictions. According to KIs, this dynamic is an adaptation to a context of extremely limited capital and liquidity which forces traders to pool resources, and continued insecurity and high crime rates, which limit trust and cooperation.



Agri-food and Seed Companies: largely inactive

KIs reported that the conflict in 2023 led to the departure of most, if not all, large companies from the assessed area. Three KIs mentioned that seed companies are still active; several mentioned that the Arab Seed Company has retained activities in Darfur, producing and selling seed. Three KIs also mentioned the emergence of new market actors. Two explained that this is due to high unemployment since the outbreak of the conflict. Two KIs suggested that those market actors who have strong relationships with authorities can obtain concessions on taxes or restrictions, and mentioned speculation that some emerging businesses maybe receiving funding directly from those authorities, aligning with findings by the Rift Valley Institute on

the tribal links of new actors enabling preferential access to markets and shielding them from looting or roadside extortion²².

Sole traders and transporters: key market actors

In the absence of large companies, KIs reported that the main actors importing and selling commodities are individual traders. KIs reported that sometimes traders work together in informal groups, based on personal relationships, to share information, pool resources and share the costs of hiring transport. Other traders reported working alone and possessing their own transport.

“There is no banking system here, for us to [borrow] a large amount of money for our work. Now we are working by an individual system or only by relationships.” - Market Actor

“We are in the market here; we know who is the good and who is the bad and who is the best and who is the honest one.” - Market Actor.

Chambers of Commerce: facilitator and liaison with authorities

There is reportedly a Chamber of Commerce functioning in each of the state capitals in the assessed area; although the existence of an Ed Daein Chamber of Commerce was uncertain. In Zalingi, the Chamber of Commerce is reported to have a relatively important facilitatory role; although it was reported that not all traders choose to work under the Chamber of Commerce. Several KIs reported that the Chamber of Commerce in Zalingi is the main intermediary between traders and the RSF authorities, advocating for traders on issues such as taxation, checkpoints and security. These descriptions broadly reflect the reported role of the Chamber of Commerce in Nyala, however there are no reports of the Nyala Chamber acting as an intermediary with local authorities.²³

In smaller markets, some NGO KIs mentioned that market management committees exist to organize individual retailers and harmonize pricing. These were not mentioned by market actor KIs, who reported that the only governing body was the Chamber of Commerce.

Government Ministries (Agriculture, Finance, Social Affairs): present but un-resourced

KIs reported that some administrative ministries have maintained a presence in the assessed area, however there is little clarity over what resources the ministries have, if any. Market actor KIs reported that Ministry of Agriculture extension services had completely ceased as a result of lack of funding for salaries, while one Mercy Corps staff member reported that these services are continuing only with the support of aid organizations. Both NGO staff and market actors reported being in contact with these ministries- one market actor reported that the Ministry of Agriculture had contacted them about reviving farmers’ cooperatives.

“They are functioning, but they have no capital to support... the Ministry of Agriculture was supporting farmers by extension services, but now even the extension has stopped,” - Market Actor.

²² Rift Valley Institute, October 2025, [Political Economy of Cash and Markets in Sudan](#)

²³ Norwegian Refugee Council, February 2026: [Market Support Assessment \(Nyala - South Darfur\), February 2026](#)

Farmers' Cooperatives: inactive

KIs reported that farmer's cooperatives supported access to agricultural inputs such as improved seeds and machinery in the assessed area before the war. These cooperatives collapsed during the recent conflict; however, NGO staff and market actors reported a desire to reinstate cooperatives.

Rapid Support Forces (RSF) and Ta'sis authority:

The RSF is the ruling military power in most of Darfur, and has backed the Sudan Founding Alliance, also known as the Ta'sis authority, as its affiliated governing authority. KIs rarely mentioned Ta'sis, however the RSF was cited as the main authority in the area. In agricultural and agro-processing supply chains, this authority manifests itself in control of some (although not all) checkpoints, but also maintenance of law and order including retribution following theft or looting.

International aid agencies: key market stimulators

Several international NGOs and UN agencies have a presence in the assessed area, including Mercy Corps, Norwegian Refugee Council and the World Food Program (WFP). KI responses indicate that the international actors play a key role in stimulating markets in Darfur, particularly through commodity procurement and emergency grants. One market actor KI reported that emergency support grants are the only source of funding in the region, although others have raised concerns that agricultural market systems have been undermined by many years of humanitarian distributions, especially of seed. Aid agencies operate in an environment of tightening regulation by the Ta'sis authority,²⁴ and generally cooperate with ministries and chambers of commerce more than with directly RSF-affiliated bodies.

Agricultural inputs:

KI reports on the availability and supply chains of agricultural inputs were varied and at times contradictory. This points to a fragmented and individualized market where knowledge, resources and strategies vary between different actors.

Across agricultural inputs, KIs reported that inputs are available, but at a price which is exclusionary to many farmers. In response to this and the lack of liquidity, KIs reported that farmers have decreased their cultivated area. Some KIs reported that farmers now focus on cultivation for subsistence or hyper-local consumption, however other reports point to some medium-scale agriculture for export or processing, such as ground nut and sesame.

KIs reported that supply chains can be very short; one farmer may contract a trader who sources seed from a seed production company and delivers it directly to the farmer. Traders mentioned that the level of prepositioning is very limited due to security risks and lack of financial capital; traders therefore prefer to bring commodities to order rather than buying in advance. Ability to store stock reportedly varies between individual traders; KIs reported that each person stores according to their own capacity. KIs reported that due to continued problems with looting, from RSF or civilian actors, most traders have moved their storage to their homes and away from markets.

²⁴ Dabanga Sudan, May 2026: [WFP: 'Humanitarian aid to Sudan imminent'](#)

“If there are any hubs, I don't think there are many of them. What I know is these guys are importing directly... they keep those in their small shops. They sell the next, they also order another one...” - Mercy Corps staff

Seeds

KIs mentioned three sources of seeds in Darfur: domestic production, importing from outside of Sudan, and importing from Eastern regions of Sudan, particularly Al Dabbah in Northern Sudan. Seeds from outside Sudan are reportedly cheaper than those from eastern Sudan, although one farmer reported that these internationally imported seeds are also poorer quality. Access to improved potato seedlings was commonly reported to be particularly difficult- while some KIs reported that these are completely unavailable, one KI reported that they source potatoes from the non-RSF territory of Jebel Marra in Central Darfur.

Fertilizers, pesticides and compost

According to KIs, both organic and inorganic fertilizers are used in Darfur. Mercy Corps programming is focused on encouraging organic fertilizers which can be produced locally. Market actors reported that fertilizers and pesticides are transported from eastern Sudan and from other countries. One farmer reported that the price of fertilizer is extremely high, in large part due to the impacts on global prices from the closure of the Strait of Hormuz²⁵ that has increased the prices of urea fertilizer by more than 67% from May 2025 to May 2026²⁶.

Machinery and fuel

Before the conflict in 2023, agriculture in Darfur was less mechanized than other areas of Sudan. Since the start of the conflict, some KIs reported that farmers still rely on tractors and large machinery for ploughing, while others reported that donkey-led tools are used for ploughing. According to one KI, large machinery like tractors was previously held by cooperatives; this KI said that imported machinery such as generators, sprayers and solar-powered processing machines are now primarily owned by private individuals and available for rent at exorbitant prices.

KIs reported that high fuel costs are a key barrier to agricultural and agro processing; one farmer reported that 20L of fuel costs 200,000 Sudanese pounds (SDG), more than doubling from the same time in 2025²⁷. Most KIs reported that the main routes for fuel are from Chad and South Sudan, while one KI reported that fuel is imported from Libya. Some KIs reported that fuel imports are the main targets of SAF drone attacks.

Financial Services

All KIs agreed that the only functioning financial service after the conflict in 2023 is the Bank of Khartoum (Bankak) online transfer service; all other banks have ceased functioning in the region. Using Bankak is reportedly costly; for traders importing through Chad, the exchange rate for Central African Francs is significantly worse for Bankak than cash. Cash is reportedly available in the assessed area, recent printing of new currency in the region was reported by one KI. However, KIs reported fees of up to 20% for

²⁵ Mercy Corps, May 2026: [From Hormuz to the Frontlines of Hunger](#)

²⁶ International Food Policy Research Institute, May 2026: [Essential Commodities Prices and Availability monitor](#)

²⁷ International Food Policy Research Institute, May 2026: [Essential Commodities Prices and Availability monitor](#)

exchanging cash for Bankak. Despite this, one KI reported that storing funds through Bankak is preferred as it is safer than storing cash.

“You will go to the market or call some of your colleagues and say, I need cash. You transfer to him and he will give you cash. But ... you lose money, for example for 1000 pound, you lose 200 pound each 1000. But you know, believe me, it’s safer than if you carry cash” - Market Actor.

There are reportedly no formal lenders in Darfur. Loans can reportedly be arranged informally, between individuals, and one KI mentioned emergency grants given by NGOs as a source of liquidity. This lack of ability to borrow, as well as hyperinflation and the destruction of capital suffered by economic actors during the war were reported as severe constraints on agriculture and agro-processing.

“We needed to start that conversation of how wholesalers can provide credits, goods, commodity credits to retailers. And they said this is something that is happening but is strongly based on relationships. Yeah, if you have a relationship, that person can give you some commodities until you pay me back, go and sell and bring back. This is something that is happening because social capital is a very, very strong thing in the market space here.” Mercy Corps Staff.

Import Routes:

A market assessment in Nyala documents import routes from Libya, Chad, the Central African Republic and South Sudan.²⁸ All of these routes were mentioned by KIs, however the most commonly reported import routes in this assessment were from Chad and South Sudan. All KIs reported that before the war, most imports came from other parts of Sudan, but KIs disagreed on whether it is still possible to import goods from SAF-controlled Sudan. Some KIs also reported import routes from Libya, and from the Central African Republic.

KI accounts suggested that the relative security and cost of different import routes is fluid and changeable. KIs disagreed over which routes are safer or more dangerous for traders to use; with the exception of importing from SAF-controlled Sudan which was widely accepted to be the most difficult and/or dangerous. Similarly, KI reports agreed that the Eastern-Sudan route is the most expensive, but among the other routes KIs disagreed on the relative prices of other routes. This variety might be due to changing conflict dynamics or due to the different social capital of individual traders. For example, one trader reported that their family ties in Chad facilitated cross-border trade along this route.

KIs agreed that all transport is costly. One farmer said that transporting agricultural inputs can cost nearly two times the inputs themselves. The cost of fuel and the taxes charged at checkpoints were the main factors mentioned.

KIs reported that there are checkpoints on all routes within Darfur, however the largest number are between SAF and RSF territory. KIs reported that checkpoints are established by various different groups including civilians and armed groups.

²⁸ Norwegian Refugee Council, February 2026: [Market Support Assessment \(Nyala - South Darfur\), February 2026](#)

“In some areas the RSF they’re controlling [the checkpoints] and in some areas SAF are controlling, and in some areas you will find some civilians with their guns and they’re making checkpoints there,” - Market actor.

Chad

This was reported by all KIs to be the main import route into the assessed area. Imports are reported to cross the border at Adre and arrive initially in the West Darfur capital of Geneina. Commodities coming through Chad are reportedly originating in Nigeria, China, and Cameroon. This route was one of two routes which KIs highlighted as the target of drone attacks. KIs agreed that recently the route has remained open during the rainy season. One KI also mentioned a border crossing with Chad at Um Dukhun in Central Darfur, although the road network from this crossing is reportedly poor.

South Sudan

Some KIs reported multiple crossings into South Sudan, however the most commonly reported crossing was at Al Na’am. Routes from South Sudan are reportedly completely impassable during the rainy season, although secondary sources indicate that an alternative route through Abyeià Al-Dain can be used during the rainy season.²⁹ One KI reported that goods imported through South Sudan are produced in South Sudan, Uganda or Kenya.

Eastern Sudan

Among market actor KIs, two reported that imports from eastern parts of Sudan are completely impossible, while two reported personal experience of sourcing commodities, including seeds from Al Dabbah in Northern State. Mercy Corps staff also reported that goods have been transferred through El Obeid, and that some sorghum has reached Darfur from Gedaref State.

“It is impossible now, because traders found many risks, so as you may lose all your all your capital” -Market actor

“Sometimes I’m requesting from...North of Sudan., from Al Dabbah. I have big trucks, sometimes they go there. On the roads, sometimes we are facing challenges, but we try.” - Market actor

Those KIs who reported that importing through SAF controlled territory is possible, described several additional constraints compared to other import routes. Firstly, during active fighting, trucks can be stopped indefinitely until fighting has ceased. Checkpoints are also reportedly more numerous and expensive on these routes than on others. Finally, military forces reportedly inspect exports and prevent some from entering. Mercy Corps staff reported that potato seedlings were recently disallowed from passing due to the fact that they were technically “food” which could be hijacked and eaten by RSF soldiers.

One Mercy Corps KI highlighted that unconventional methods of transportation, and reliance on personal relationships, are leveraged by traders to bring goods across the SAF/RSF border. Traders, on the other

²⁹ Norwegian Refugee Council, February 2026: [Market Support Assessment \(Nyala - South Darfur\), February 2026](#)

hand, reported that the main factor in bringing goods across the front line is a willingness to pay high fees and taxes.

Central African Republic

One KI mentioned the Um Dukhun crossing, which is situated at the border of Chad, Sudan and the Central African Republic. Other reports also highlight the trade route between Birao in the Central African Republic and Um Dafuq in South Darfur.³⁰ Imports from the Central African Republic were not mentioned by any market actor KIs, however its status as a historically important trade route,³¹ and its appearance in recent market assessments, suggests that this route is still functioning.

Libya

This route was mentioned by two KIs, both Mercy Corps staff. Mercy Corps staff highlighted that this route is relatively unsafe, being targeted by drone strikes and passing through parts of North Darfur where the security situation remains very fragile. A recent assessment of trade routes into Nyala also reported that this import route is inactive due to conflict.³²

Agro-Processing:

KIs reported that before 2023, agro-processing in Sudan was mainly concentrated in and around Khartoum; however some medium-scale processing capacity existed in Darfur, particularly in Nyala. KIs had relatively little information on processing, suggesting that any processing which is happening is poorly integrated into the regional market.

KIs reported that most agro-processing has stopped since the outbreak of civil war. This is due to:

- Physical destruction of factories and lack of parts to repair machinery
- Factory owners leaving the region and little capacity to run processing
- High fuel costs

KIs agreed that most agro-processing now is in the form of traditional, small-scale milling and oil pressing. Supply chain analysis of sorghum in Nyala found little evidence of milling after the outbreak of conflict.³³ One KI reported that the milling which does occur in the assessed area is operated as a service rather than a complete agro-processing business. Small mill owners will charge customers to mill grains and then return the milled produce to the customer, rather than buying large stocks of grains to mill and resell.

KIs reported small-scale oil pressing in the assessed area, including in Zalingi, Nyala and Al Daein. Oil pressing capacity appears to be insufficient to match the market needs, with KIs reporting that cooking oil is

³⁰ Norwegian Refugee Council, February 2026: [Market Support Assessment \(Nyala - South Darfur\), February 2026](#)

³¹ ACAPS, November 2025: [SUDAN Economic impacts and emerging trends in West and Central Darfur](#)

³² Norwegian Refugee Council, February 2026: [Market Support Assessment \(Nyala - South Darfur\), February 2026](#)

³³ IMPACT Initiatives, March 2026: [Sudan Supply Chain Analysis Sorghum Supply Chains in Khartoum and South Darfur](#)

imported, and that raw materials including ground nuts and sesame are exported to Chad and South Sudan unprocessed.

KIs reported that milling and oil pressing is conducted using small generators; one KI reported that some solar-powered processing machines are entering Darfur. The up front cost of these solar machines is high, but the running cost is far lower than diesel generators.

Two KIs reported that some water bottling factories are functional, in Geneina, Wadi Saleh and Nyala. A water bottling factory in Zalingi is reportedly inactive due to damage during the conflict. Although a report in February noted that jerry can production in Nyala was inactive,³⁴ one KI reported that jerry cans are being produced in Nyala, although this is limited by poor supply of raw materials.

“There is some level of large-scale processors, medium to large scale processors. But some of these are the things that the war affected because some people had to flee, you know, some people left. And then we have new entrants into the market. So now, with the new entrance, capacity is also another thing.” - Mercy Corps staff.

³⁴ Norwegian Refugee Council, February 2026: [Market Support Assessment \(Nyala - South Darfur\), February 2026](#)

Conclusion

This rapid assessment suggests that agricultural supply chains in East, South, Central and West Darfur are functioning to some extent, but under severe constraints.

Inputs such as seed, fertilizers, machinery and fuel can be sourced but at high costs. Inputs are imported mainly from Chad and South Sudan, although imports from SAF-controlled Sudan appear to be possible for some traders. Input supply chains have become highly individualized and fragmented: with very few large companies and very little storage capacity, individual traders and informal groups of traders have become the key actors in supply chains.

Other key actors in supply chains are Chambers of Commerce, international NGOs, and (indirectly) ruling authorities. Farmers Cooperatives and the Ministry of Agriculture could become key actors in supply chains if they are resourced and re-instated.

Most agro-processing, on the other hand, does not appear to have recovered since the outbreak of civil war. Small-scale milling and oil pressing are widespread, and some reports suggest water bottling and jerry can production are functioning.

Barriers to processing include physical destruction of machinery, absence of former processing companies and high fuel costs.

KI recommendations

Market actor KIs made several suggestions of priority actions that international NGOs should take to support the recovery and resilience of the agricultural and agro-processing sectors in East, South, Central and West Darfur. These are:

- Supporting the re-establishment of farmers cooperatives
- Supporting the provision of loans to traders providing key agricultural inputs
- Support the provision of agricultural extension services
- Supporting the recovery of domestic processing

These recommendations reflect a broader shift in the agricultural system towards informal, relationship-based market structures, where traders and existing market actors play a central role. In this context, interventions are more effective when working through existing networks, supporting flexible aggregation models, and focusing on practical, small-scale solutions rather than relying on the rapid restoration of formal institutions or large-scale infrastructure.



Recommendations:

- **Prioritize rapid support for seeds, fertilizer, fuel, machinery, irrigation, cash, and market access** to support agricultural and agro-processing and prevent lower harvests and deeper food insecurity later in 2026 and into 2027.
- **Fund urgent anticipatory action for future planting seasons** recognizing that current disruptions will have ongoing effects in future planting cycles)
- **Protect food, fuel, and fertilizer supply chains** and support measures that keep essential goods moving into and within crisis-affected countries, including last-mile transport, local procurement, port and border facilitation, and support to market actors facing rising fuel and logistics costs.
- **Scale flexible cash and market-based assistance** while expanding flexible cash, voucher, and market-based assistance to help households can absorb rising food, fuel, transport, and water costs, while also strengthening real-time market monitoring to trigger faster scale-up where prices spike.
- **Deliver input support and short-term credit through existing trader and agro-dealer networks, rather than waiting for formal financial services to return.** Programs can de-risk this through partial guarantees or grant-backed working capital where feasible, enabling traders to extend inputs (such as seeds, fertilizer, and fuel) on credit with repayment after harvest, supported by simple risk-sharing approaches.
- **Prioritize support to existing market actors with established networks and access routes** and ensure that seed and input support is channeled through local traders where possible, to avoid undermining already fragile and relationship-based supply chains.
- **Support practical aggregation models that reflect current trading dynamics, including trader-linked farmer networks and contract farming arrangements,** rather than focusing only on rebuilding formal cooperatives.
- **Support the recovery of agro-processing through targeted support to small and medium-scale operators,** including repair of equipment, limited access to fuel-efficient or solar-powered technologies, and working capital where feasible, rather than attempting to restore large-scale industrial capacity in the short term.
- **Secure from all conflict parties a clear prohibition on predatory taxation on food, agricultural inputs and commercial food flows,** starting with routes supplying IPC Phase 4 and 5 areas. (For instance, inputs such as potato seedlings should not be prohibited). Obtain commitments from all parties that no administrative, checkpoint or “security” measures will impede the movement of food, including for crossline and cross-border movements.

CONTACT

Miji Park
Country Director
mpark@mercycorps.org

Crisis Analysis Team
hhanafi@mercycorps.org

About Mercy Corps

Mercy Corps is a leading global organization powered by the belief that a better world is possible. In disaster, in hardship, in more than 40 countries around the world, we partner to put bold solutions into action — helping people triumph over adversity and build stronger communities from within. Now, and for the future.



45 SW Ankeny Street
Portland, Oregon 97204
888.842.0842
mercycorps.org