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SUDAN

In-Depth Gender-Sensitive Joint Labour Market Assessment (LMA)

September 2026



EXECUTIVE SUMMARY

Sudan is experiencing **one of the most severe humanitarian crises in the world**, driven by the armed conflict that erupted in April 2023. The conflict has triggered one of the largest displacement crises globally, with over 15 million people displaced as of April 2026.¹ **Widespread destruction of economic infrastructure and key productive sectors has dramatically reduced livelihood opportunities and shrunk labour demand** across the country. Conflict dynamics, population movement, inflation, supply chain disruptions and fragmented governance have further constrained the labour market, with per capita income having fallen from USD 3,400 in 2022 to USD 2,000 in 2024, a level not seen since 1992.² Youth aged 15 to 35 primarily bear a disproportionate share of these pressures; they already faced structural barriers to employment before the conflict, including weak private sector development, limited job creation, and a persistent mismatch between education systems and labour market needs.

Despite the scale of these challenges, the **evidence base on youth labour markets in Sudan remains fragmented**. With almost 20 livelihood zones and significant regional divergence across states, existing data is insufficient to inform targeted, context-specific programming. In particular, there is a critical gap in up-to-date, localised evidence on viable livelihood opportunities, sector-specific labour demand, and the constraints facing Micro, Small and Medium Enterprises (MSMEs) in sustaining or expanding employment. Against this backdrop, the Enabling Market Pathways and Opportunities for Work, Economic Recovery and Resilience (EMPOWER) programme, led by the Danish Refugee Council (DRC) and Mercy Corps in partnership with Sudanese NGOs and funded by the European Union (EU), commissioned an **In-Depth Gender-Sensitive Joint Labour Market Assessment (LMA)**, in collaboration with IMPACT Initiatives. **The assessment examined labour supply and demand, skills gaps, workforce capacity and broader market systems across nine target states** to inform livelihood-pathway prioritisation. Using a mixed-methods, Market Systems Development (MSD) approach, the assessment combined secondary data with 2,814 youth and 936 employer/MSME surveys, 66 key informant interviews and 54 focus group discussions. Data were collected across 18 localities in nine states between July and August 2026.

The findings highlight that **a majority of youth in the study areas were not engaged in employment or income-generating activities**. Over half of respondents (59%) were not working, and 58% of these had never worked, a share far higher among young women (70%) than young men (33%). Employment is predominantly informal and self-arranged, led by self-employment (47%) and casual daily labour (26%). Trade **accounted for the largest reported share of youth employment (35%)**, with petty trade the most commonly reported economic activity. Petty trade was also the activity most frequently identified by both female (64%) and male (65%) youth as a suitable business or employment option, indicating strong interest in accessible forms of self-employment and income generation. Among working youth, 47% of those in services and 45% of crop farmers said their skills fully match their work, against 37% of petty traders. **Nepotism and favouritism were the most frequently reported institutional or systemic barriers** to employment (41%).

Employer survey data covers four broad sectors: services (35%), trade (30%), manufacturing (15%) and agriculture (13%), and points to considerable variation in hiring potential and job quality. Services show the strongest overall employment potential, combining an established business base (43% operating for more than six years), comparatively high recruitment (46% hiring in the past 12 months) and a higher concentration of young workers, though access remains heavily skewed towards young men. Trade was the sector with the most readily available entry point into the labour market and is reported by youth to be the most accessible sector, but low hiring and a limited share of larger employers indicate a limited potential for expanding wage employment. The manufacturing sector has the largest share of MSMEs and the highest demand for technical and skilled workers, but youth and women's representation in the workforce remains low. Agriculture remains

¹ IOM DTM, [Sudan: Three years of conflict and displacement](#) (2026).

² Enoch Randy Aikins, [Beyond the Conflict: Charting a path to sustainable growth and development in Sudan](#) (2026).



an established and relatively stable sector, aligned with the agropastoral landscape of Sudan, with a high demand for casual labour; active youth participation is comparatively limited, linked to displacement and access constraints.

Across all sectors, employers report substantial difficulty in recruiting suitably skilled workers (44% overall), and youth confirm the gap: only a third (32%) say their skills fully match available opportunities. These differences point to the importance of tailoring skills development and employment interventions to sector-specific labour demand rather than relying on a single skills or training model across locations. **Employers' capacity to create new vacancies is constrained, most often by limited access to finance (61%),** followed by weak business growth (43%) and high labour costs (33%). These findings suggest that addressing youth employment constraints will require not only investments in young people's skills and employability but also measures that address the financial and operational constraints limiting employers' capacity to recruit and train youth.

Market and institutional constraints further affect the ability of businesses to create and sustain employment. Financial services (37%) and market information (36%) were the most commonly reported support services accessed by employers, while the support employers say would most help them hire or train youth is wage subsidies (62%), access to finance for the business (53%) and equipment and tools (44%), while taxation and fees were the most frequently reported policy and regulatory barrier (52%). At the broader market level, the conflict has increased transaction costs by an estimated 30–40% and contributed to a reported 45% decline in formal cross-border trade, further limiting market access and increasing the costs and risks of business operations. Despite these constraints, 58% of employers expressed willingness to participate in employment-creation interventions, indicating potential scope for employer engagement in initiatives that address both workforce and business constraints.

Findings on viable pathways to employment indicate two limiting factors that are reported across the assessed states and sectors: access to finance and the availability of workers with the specific skills employers need. Agriculture shows convergence across the three states where it is a priority or promising pathway, with casual labour demand and finance identified as key barriers in all of them. In services, finance and weak business growth are the leading employer constraints in Gedaref and North Kordofan, and weak business growth in Kassala; in all three, employers report relatively little difficulty finding candidates, which points to a constraint on employers' capacity to offer secure, well-paid roles rather than a skills gap; in River Nile and South Darfur, by contrast, hiring difficulty is high (62% and 51%), making services there a skills-matching case. The trade sector (promising in two states) combines strong income adequacy with hiring difficulty, indicating an accessible but largely informal pathway.

The same sector can face different underlying constraints in different states, and the findings show the specific sector–state combinations where employer demand and youth outcomes converge most strongly. The findings point to the need for livelihood interventions that are responsive to young people's existing skills, educational profiles and livelihood preferences while also being grounded in actual employer demand and local market conditions. This includes differentiated skills development aligned with sector-specific staffing needs, support for accessible self-employment pathways where appropriate, and measures that help MSMEs overcome financial, operational and regulatory constraints to hiring and training youth. Given the substantial variation across states and sectors, interventions should be adapted to local market conditions rather than applying a uniform approach across the nine target states. The programmatic considerations that follow the key findings set out how these findings could translate into programming, for validation with the EMPOWER partners.

KEY FINDINGS

- **Context:** Sudan's protracted conflict has driven large-scale displacement with severe economic impacts, including currency devaluation, inconsistent access to markets and a fragile policy and regulatory environment, compounding pre-existing barriers to youth employment.
- **Employment status:** A majority of surveyed youth (59%) were not employed, and most youth out of employment (58%) had never engaged in any form of income-generating activity. This is more pronounced among female youth (70%) than males (33%) and among persons with disabilities (76%) compared to youth without functional difficulties (56%). Among youth who had engaged in income-generating activities, only 7% had secured their current or most recent opportunity through formal employment channels, while employment was predominantly based on self-employment, particularly among female youth (70%) compared with male youth (55%).
- **Key sectors:** Youth employment is predominantly informal (self-employment 47%; casual daily labour 26%) and concentrated in trade (35%), mainly petty trade, which both female (64%) and male (65%) youth see as the most suitable business or employment option. Self-employment is also what youth want: 77% prefer it to wage employment (15%). Nepotism and favouritism (41%) are the most reported institutional barriers to employment.
- **Gender gap:** A substantial gender income gap was reported, with 62% of female youth and 32% of male youth earning less than 200,000 SDG per month. This is less than one-third of the 689,341 SDG required to cover the basic commodities included in the Minimum Expenditure Basket (MEB). At the top of the distribution the gap is as wide: among youth in services, 11% of young men earn 501,000–800,000 SDG and 10% over 800,000 SDG a month, against 2.5% of young women in each band.
- **Promising livelihood pathways:** Employers report a considerable variation in employment potential across different sectors: services combine an established business base with the highest instances of recent hiring (46%) and youth concentration, although access is mostly for men. Trade is the most accessible entry point, although it offers limited potential for wage-employment growth. Manufacturing has the largest MSME base and the strongest demand for technical/skilled workers but low youth and women's participation. Agriculture is stable and labour-intensive, although youth participation remains limited and interest is only moderate: crop farming is the second most suitable option youth name (32% of young women, 38% of young men), well behind petty trade.
- **Skills gap:** Skills mismatches are widespread and sector-specific. Some 44% of employers report difficulty in recruiting suitably skilled workers, and only a third (32%) of youth say their skills fully match available opportunities, indicating that skills interventions need to be tailored by sector. Employers hire on work experience (63%) and reliability (49%) ahead of technical skills (43%), and their main concerns about hiring youth are lack of experience (54%) and reliability and discipline (37%).
- **Key barriers:** Employers' capacity to create and sustain employment is most constrained by limited access to finance (61%), followed by weak business growth (43%) and high labour costs (33%). Within the market system, taxation and fees (52%) are the leading regulatory barrier. Despite this, over half (58%) of employers are willing to participate in employment-creation interventions.
- **Job access barriers for persons with disabilities (PwD), IDPs and returnees:** Youth with functional difficulties cite physical barriers (58%), communication challenges (34%), and stigma

(33%) as major obstacles. Displaced and returnee youth attribute job loss primarily to lost assets/capital (80%), mobility constraints (36%), and lost networks (29%).

- Access to finance and the availability of appropriately skilled workers are the two limiting factors recurring across the assessed priority and promising pathways, although the specific constraint driving each pathway varies by state. This indicates that the same sector can require different responses in different locations.

EVIDENCE-INFORMED PROGRAMMATIC RECOMMENDATIONS FOR EMPOWER PARTNERS

The state- and sector-specific recommendations are set out in the two pathway tables in section 4.4; the considerations below cut across them. These are developed jointly with EMPOWER programme partners, drawing on the assessment findings and their operational knowledge, and are intended to translate identified labour-market constraints and opportunities into potential programming directions. Where they concern specific implementation modalities, these should be tested and adapted to the local context rather than interpreted as approaches whose effectiveness was directly evaluated by this assessment.

1. Select activities, not sectors, and select from the market backwards. Before enrolment in each locality, prepare a one-page market map (which activities are saturated, which buyers and employers are short of supply or workers, which trades are named as short) from the state annexes, and update it every six months through the field teams. *Evidence: petty trade is the activity most youth identified as a suitable business or employment option (64% of young women, 65% of young men) and trade is the sector with the lowest employer absorption (0.6 recruits per business against 1.3 across the sample); providers describe markets "full of the same activity".*

2. Tailor productive-capital support to the requirements of each pathway rather than applying a uniform grant package. Depending on the activity and market context, this could include productive assets, tools, initial stock, inputs or other forms of start-up capital. *Evidence: lack of capital is the primary barrier for 70% of youth and 81% of working youth, and 74% of employers named lack of finance as a constraint on growth.*

3. Consider piloting time-bound subsidised placements or apprenticeships with willing employers to reduce the initial cost of recruiting inexperienced youth. Such arrangements should establish clear terms on wages or stipends, hours, duration and workplace safety, and should be monitored for transition into continued employment. *Evidence: 58% of employers would take part in a youth employment programme and a further 22% might; stipend or wage support is the condition they most often set (47%) and the support they most often ask for to host apprentices (59%); their main reservation about young applicants is lack of experience (54%).*

4. Build dual apprenticeships where training capacity exists, and alternative delivery where it does not. Establish partnerships with functioning government and private centres for training and certification through the trade tests, using appropriate training materials; contract master craftsmen and businesses for practice; pay the trainee a stipend and transport. Prioritise the specific trainings/skills that are identified by employers as being in limited supply (such as electrical, refrigeration, plumbing, welding, mechanics, phone repair, solar). Where no centre is operating, mobile trainers and master craftsman placements should be considered. Labour market actors' operational mapping conducted by partners should determine which centres are functional enough to contract in each intervention area. *Evidence: technical and vocational skills are the ones youth most want to acquire (54%); 22% of employers already take apprentices and a further 11% did so previously; training providers describe a system that has lost capacity since 2023.*

5. Consider the two crucial functions the market may not be providing: post-start support and intervention area-level matching. Establish continuing support for new businesses after start-up, drawing on experienced business owners and entrepreneurship centres, and a light matching function in each locality through a youth association, chamber of commerce, unions/organisations of persons with disabilities or business support centre(s). The form, intensity and duration of both services should be set with partners and tested locally. *Evidence: only 3% of youth and 5% of employers have access to a job-matching service, 55% of employers say one would help their business, and providers name post-start mentoring as the scarcest and most important service.*

6. Avoid assuming that conventional individual credit is the appropriate response to the finance constraint. Given reported concerns related to debt, irregular income and collateral or guarantor requirements, consider lower-risk and more flexible mechanisms, including savings groups, supplier credit and appropriately designed youth finance products, based on the pathway and participant profile. *Evidence: 57% of youth use no financial service and nearly half (49%) report irregular income; women in the focus groups identify savings groups as the instrument that works for them, and providers report that no product is designed for youth.*

7. Design labour-intensive works as an asset programme. Use cash for work to build or rehabilitate the infrastructure youth and employers identified as constraining their market activities (feeder and market roads, market sheds and storage, solar water and cold-storage points, rehabilitation of workshops and youth centres). Pay at least the prevailing casual wage, in cash where there is limited infrastructure and/or mobile-money fees are high, and link participation to complementary savings and skills development support. *Evidence: roads connecting markets (48%), health facilities (39%) and market infrastructure (39%) are youth's stated priorities for economic recovery, and 51% of employers would participate in public works.*

8. Design women's economic-inclusion pathways based on demonstrated market opportunities and the identified constraints, rather than defaulting to traditionally female activities. Where relevant, adapt training location and timing, transport, childcare or care support and training arrangements to reduce participation barriers, and engage household and community decision-makers where these influence women's participation. Use the state and locality pathway analysis to identify occupations where women are currently under-represented but where employer demand and women's interest indicate realistic opportunities for expansion. *Evidence: among petty traders, 70% of young women earn under SDG 200,000 a month against 29% of young men; the focus groups set out the conditions under which women can take part.*

9. Tailor employment support to the needs of displaced people and persons with disabilities. For displaced youth, assess whether loss of productive assets, documentation and local economic networks constrains re-entry into previous or related livelihoods, and tailor support accordingly. For youth with disabilities, work with representative organisations to identify accessible livelihood pathways and reasonable accommodations, including transport, accessible venues, communication support and assistive devices where required.

10. Adaptive implementation to contextual differences across intervention areas. Tailor the support mechanisms to local conditions, including differences in access, financial services, training capacity, market functionality, and availability of local partners. In areas with more constrained operating environments, use flexible assistance delivery arrangements, work through trusted local actors such as neighbourhood committees, youth initiatives and local traders, and keep asset sizes and programme requirements appropriate to the local context.

11. Consider measuring job quality, not only placement. Across intervention areas, track participants' periodic income relative to the local MEB cost, income stability, workplace safety and number of paid days at baseline, six months and twelve months, using the definitions set out in this report. Include a sample of non-participants to assess displacement and saturation effects.

For the implementing partners and donors, the findings support funding the packages of interventions rather than individual components in isolation. This includes allowing programme resources to cover employer-side

subsidies and materials for public training centres, while recognising that wage-employment targets are likely to remain modest and self-employment may account for the largest share of employment outcomes.

For state and locality authorities, three measures identified by employers, youth and officials could help mitigate barriers to employment and businesses: providing a grace period on local administrative fees and licence costs for new youth enterprises; implementing the existing 5% public-sector quota for persons with disabilities; using labour offices' registers as a channel for matching.

For training and finance institutions, priorities include offering short courses without age or formal certificate barriers, linked where relevant to trade testing and certification, and developing youth-oriented financial products that use group liability or programme guarantee in place of conventional collateral and guardian approval.



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LIST OF ACRONYMS

ABS	Agricultural Bank of Sudan
AfDB	African Development Bank
BDS	Business Development Services
DRC	Danish Refugee Council
EMPOWER	Enabling Market Pathways and Opportunities for Work, Economic Recovery and Resilience
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FEWS NET	Famine Early Warning Systems Network
FGD	Focus Group Discussion
GDP	Gross Domestic Product
ICT	Information and Communication Technology
IFC	International Finance Corporation
IFPRI	International Food Policy Research Institute
II	Individual Interview
ILO	International Labour Organization
IOM	International Organization for Migration
IDP	Internally Displaced Persons
IPC	Integrated Food Security Phase Classification
ISIC	International Standard Industrial Classification
KII	Key Informant Interview
LMA	Labour Market Assessment
NGO	Non-Governmental Organisation
MSME	Micro, Small and Medium Enterprise(s)
MSD	Market Systems Development
OCHA	UN Office for the Coordination of Humanitarian Affairs
PwD	People / Persons with Disabilities
SDG	Sudanese Pounds
TVET	Technical and Vocational Education and Training
ToR	Terms of Reference
UNDP	United Nations Development Programme
UNICEF	United Nations Children's Fund
UNIDO	United Nations Industrial Development Organization
UNSTATS	United Nations Statistics Division
USD	United States Dollars
WB	World Bank
WFP	World Food Programme

GEOGRAPHIC CLASSIFICATIONS AND DEFINITIONS

State: Highest form of governance below the national level

Locality: Second-tier administrative and local government unit directly below the state level

Micro, Small and Medium Enterprises (MSMEs): Defined using the number of employees as the primary classification criterion, as recommended by the International Finance Corporation (IFC).

- Micro enterprises: 1–9 workers
- Small enterprises: 10–49 workers
- Medium enterprises: 50–200 workers
- **Market actor types:** employers classified themselves from the survey list (smallholder farmer or producer, livestock actor, MSME, service provider, small business or trader, informal vendor, medium



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trader, informal trader, informal operator, daily labour contractor, informal service provider, informal enterprise, public, NGO or private employment service provider, government institution, employment agency). The “informal” categories denote self-described unregistered operators; the survey did not apply a separate legal definition of informality, so shares by actor type should be read as self-classification.

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CONTEXT AND RATIONALE

Sudan is facing a severe and protracted crisis driven by the conflict that began in April 2023. The conflict has triggered one of the world's largest displacement crises, although 2026 has seen a decline in new displacement alongside a substantial increase in returnees. IOM reported 5.15 million returnees by September 2026, 82% of them former IDPs and the remainder from abroad, mainly Egypt, South Sudan and Libya, against 8.58 million people still internally displaced, down from a peak of 11.6 million in January 2025³, while an estimated 33.7 million people, more than half of Sudan's population, are expected to require humanitarian assistance in 2026. Returnees are concentrated in Khartoum (2.1 million by June 2026, with two million more expected during the last quarter of the year), Gezira, North Darfur, and Sennar, with direct implications for the labour markets assessed in these states. Additionally, Khartoum is absorbing returnees faster than its infrastructure and its private sector are recovering. Meanwhile, South and North Darfur continue to host the country's largest displaced populations, with 1.76 million and 1.68 million, respectively, in June 2026).⁴⁵ Widespread disruption to economic systems, infrastructure, markets and productive sectors has significantly reduced livelihood opportunities and weakened labour demand across the ⁶country. Conflict dynamics, population movements, inflation, supply-chain disruption, insecurity and fragmented governance structures have further constrained both formal and informal labour markets, affecting market access and the viability of employment and enterprise pathways across different corners of the country.

The economic consequences have been severe. **Per capita income has fallen from USD 3,400 in 2022 to USD 2,000 in 2024, reaching levels not seen since 1992, while extreme poverty is currently worse than at any point in the 1980s.** After contracting by 29% in 2023 and 14% in 2024, the economy is estimated to have grown by 3% in 2025 and is projected to grow by 5.5% in 2026 from a much smaller base; inflation, which ran at 170% in 2024 and 112% in 2025, is projected at 78% for 2026, and 59% of Sudanese were living on less than USD 3 a day in 2025. **Full-time wage employment had already fallen from 33% of workers before the war to 16% in 2024,** so the labour market described in this report is overwhelmingly informal. The data for this assessment were collected before a sharp currency movement: the parallel rate moved from around SDG 4,050 to the dollar in April 2026 to 6,400 in late August, after the central bank lifted restrictions on bank rates, and pushing the rate to 8,400 in mid-September before declining to around 7,400 following a large import-finance facility, so the wage bands quoted in this report should be read as July to August 2026 values.⁷⁸ These conditions have disrupted education and livelihoods, reduced access to skills development and finance, and constrained businesses' ability to operate, retain workers, recruit and expand. **Groups that already faced multiple and compounding barriers to economic participation⁹,** including internally displaced persons (IDPs), returnees, women and girls, youth with disabilities, and young people living in conflict-affected areas, currently face additional constraints related to insecurity, displacement, limited access to finance, and exclusion from the social and economic networks through which employment and enterprise opportunities are accessed.

These pressures are particularly acute in relation to food security and prices. The May 2026 IPC analysis classified 19.5 million people (41% of the population) as facing acute food insecurity (IPC Phase 3 or

³IOM DTM, [Sudan: Three years of conflict and displacement](#) (2026).

⁴ IOM, Five million Sudanese return home to broken places, 21 September 2026; IOM DTM Sudan Displacement and Return Snapshot Update 8, 18 August 2026; DTM state tables, December 2024 and October 2025.

⁵ OCHA, Humanitarian Needs and Response Plan (HNRP) 2026.

⁶ Fund for Youth Employment (2025), Country Case Study: Sudan.

⁷ World Bank, Sudan Macro Poverty Outlook, April 2026, and Sudan Economic Update, May 2025; Central Bank of Sudan circulars and parallel-rate reporting in Sudan Tribune and AllAfrica, August to September 2026.

⁸ UNDP Report: Beyond the Conflict (2026).

⁹ World Bank (2021), Barriers to Employment for Women and Youth in Sudan.

above) between February and May 2026. Famine (IPC Phase 5) risk persisted in parts of North and South Darfur and South and West Kordofan between September 2025 and February 2026.¹⁰ **The 2025 cereal harvest was 22% below the previous year and 27% below the pre-war average, and sesame and groundnut output 48% and 55% below their five-year averages.** This could be associated with the limited access to financial services, particularly loans, as the Agricultural Bank provided no lending in Darfur, Kordofan, Gezira and Northern State in ¹¹2025. Weather conditions are likely to have added to these constraints, with 2026 rainfall also 30% below average in Gedaref and the lowest on record in North Kordofan.¹² These production and financial service pressures are reflected in food prices: the WFP minimum food basket cost SDG 2,474 per person per day nationally in April 2026, 37% above a year earlier, ranging from SDG 1,516 in Central Darfur to SDG 4,741 in besieged South Kordofan, while the casual daily wage that WFP tracks averaged SDG 14,704, or approximately ten kilograms of sorghum.¹³ The wage and minimum food basket values should be interpreted cautiously, as a wage exceeding the per-person food basket cost does not necessarily indicate surplus household income, given that the basket does not cover non-food expenses or total household food needs.

On the demand side, the private sector that would absorb young workers has contracted sharply. UNDP estimates that around one in three firms has closed since April 2023, that surviving MSMEs lost on average 36% of their revenue and that 88% of the firms that were displaced closed, although 71% of owners intend to reopen.¹⁴ **The national grid has lost more than half of its capacity,** and Khartoum had around five hours of electricity a day in August 2026; the government exempted solar systems from customs duties in the same month, and a UNDP value-chain study found solar installation and maintenance constrained mainly by a shortage of trained technicians.¹⁵ **More than 70% of bank branches closed during the war, deposits are concentrated in one bank, and mobile-money agent fees of 10 to 20% are common outside the main towns.**¹⁶ Around 1,800 industrial facilities in Khartoum were damaged and 650 destroyed; a Ministry of Industry recovery committee and a UNIDO industrial recovery programme were launched in 2026, and the AfDB and IOM are financing the rehabilitation of twenty vocational training institutions in River Nile, White Nile, Gezira and Sennar.¹⁷

Youth primarily bear a disproportionate share of these pressures, and youth unemployment already reflected persistent structural constraints, including limited job creation, weak private-sector development, and a disconnect between education and labour-market requirements even before April ¹⁸2023. The conflict has intensified these challenges through widespread job losses, displacement, disruption to education and training, and reduced access to economic networks and markets. As a result, **many young people have been pushed towards precarious, low-productivity and informal forms of work, often with limited prospects for progression or sustainable income generation.**¹⁹

However, the nature and scale of these constraints vary considerably across Sudan and remain insufficiently understood. The country encompasses almost 20 distinct livelihood zones,²⁰ with substantial regional differences in economic structures, market access, livelihood strategies and exposure to conflict. Existing evidence on local livelihoods and labour markets is fragmented and, in many cases, predates the major economic and population shifts triggered by the conflict. Particularly, there is **limited up-to-date and localised evidence on viable livelihood opportunities, sector-specific labour demand, skills requirements,**

¹⁰ IPC, [Sudan acute food insecurity analysis](#) (May 2026).

¹¹ FAO, [Annual Crop and Food Supply Assessment Mission \(CFSAM\) to the Republic of Sudan](#) (2026).

¹² FAO, [Global Information and Early Warning System \(GIEWS\)](#) Country Briefs – Sudan (September 2026).

¹³ WFP, [Sudan Market Monitor](#) (April 2026).

¹⁴ UNDP, [Sudan Private Sector Engagement Strategy 2026–2028](#) (April 2026).

¹⁵ UNDP, [Solar Energy Value Chain Study](#) (May 2026).

¹⁶ CGAP, Sudan inclusive finance dispatches, 2024–2025.

¹⁷ AfDB and IOM, [Sudan - Integrated Social Sector Infrastructure Rehabilitation Project](#) (October 2025).

¹⁸ Suliman & Ebaidalla, [Youth Unemployment in Sudan: Challenges and Prospect](#) (2019).

¹⁹ Ali et al., [Youth Unemployment and Resilience in Eastern Sudan](#) (2025).

²⁰ FEWS NET, Sudan [Livelihood Zones](#) (2014).

and the constraints faced by MSMEs in sustaining or expanding employment. This evidence gap limits the ability of programmes to identify realistic employment and enterprise pathways and to tailor interventions to the conditions of specific locations and population groups.²¹ There is therefore a **clear need for integrated, area-based analysis that considers labour supply and demand alongside market opportunities, supporting functions, institutional and regulatory factors, and the broader constraints affecting access to sustainable livelihoods.**

This variation is visible across the nine assessed states, which fall into three groups that **should be considered distinctly for programme design.** Kassala, Gedaref, River Nile, White Nile and Khartoum are under government control, with functioning if damaged institutions, banks and training centres, and with White Nile exposed to repeated drone strikes on its infrastructure in 2026. North and South Kordofan are contested: El Obeid has been under siege-like conditions with renewed displacement into the city since August 2026, and the sieges of Kadugli and Dilling were broken and re-imposed during the year.²² South and Central Darfur are administered by a de facto authority with a separate currency in circulation²³, a different tax structure, limited functionality of bank and market systems, mostly supplied through Chad, Libya and South Sudan.

The EMPOWER programme, led by the Danish Refugee Council (DRC) and Mercy Corps and funded by the European Union, is designed to respond to these challenges through phased livelihood pathways. Its goal is to generate employment and income opportunities for young people affected by displacement and their host communities, through both wage employment and self-employment, in any sector that offers viable opportunities for youth. To support evidence-based and contextually relevant programme design, EMPOWER partners, in collaboration with IMPACT Initiatives, conducted an **In-Depth Gender-Sensitive Joint Labour Market Assessment** across the programme's nine target states. The assessment examines key dimensions of the labour market system for young people aged 15–35, including labour supply and demand, youth skills and aspirations, skills gaps and workforce capacity, and the wider market-system and economic environment, including rules, norms and regulations, with recommendations for interventions that address the underlying causes of labour-market constraints in each state. It is intended to inform decision-making within the EMPOWER programme and among relevant stakeholders working on youth livelihoods and market systems development. In particular, **the findings support the prioritisation of sectors and livelihood pathways, the design and targeting of cash for work and skills development interventions, and the development of MSME support models that are responsive to local market conditions.** By generating localised evidence on labour demand, youth skills and aspirations, business constraints and systemic barriers across the nine target states, the assessment provides a basis for **more targeted, evidence-based and context-specific programming.**

This report first presents the assessment methodology and its limitations, followed by the key findings at national and state levels. At the national level, the analysis examines the youth labour profile, employment and livelihood aspirations, labour-market supply and demand, skills and workforce capacity, and the broader enabling environment. The state-level analysis then examines labour supply and demand dynamics, supporting functions, rules and norms, key employment and livelihood pathways, and the factors shaping access to economic opportunities in each of the nine target states. The report also sets out evidence-informed programmatic considerations developed with the EMPOWER partners, and broader considerations for stakeholders engaged in youth livelihoods, employment and market-systems development in Sudan.

²¹ Kirui et al., [Supporting Sudan's Entrepreneurs in Crisis: Policy insights from micro, small, and medium enterprises](#) (2024).

²² FEWS NET, [Food Security Outlook Update](#) (August 2026).

²³ Sudan Tribune, [Sudan Central Bank monitors foreign currency use in RSF controlled border areas](#) (22 June 2026).



Methodology

This assessment used a mixed-methods design built on a Market Systems Development (MSD) approach, which examines how youth labour supply, private-sector labour demand, and the supporting functions and the rules and norms around them interact to shape young people's access to employment. It combined a secondary data review with four complementary primary methods and was implemented across nine states by trained enumerators from Mercy Corps and the Danish Refugee Council, with technical oversight from IMPACT Initiatives.

The methodology was designed to answer research questions across three areas: youth labour supply, its characteristics, dynamics and constraints; labour market demand and opportunities; and the systems, institutions and pathways that connect supply and demand.

1.1. Geographical scope

The assessment covered nine states: Central Darfur, Gedaref, Kassala, Khartoum, North Kordofan, River Nile, South Darfur, South Kordofan and White Nile. These were selected based on the implementation areas of EMPOWER.

Within each state the locality was the primary unit of analysis focusing on urban areas, with two localities assessed per state and two exceptions: White Nile, where only one locality (Kosti) was covered due to operational, planning or access constraints, and Khartoum, where three localities were assessed. This gives 18 assessed localities in total: Madeinat Kassala and New Halfa (Kassala); Ad Damer and Atbara (River Nile); Sheikan and Er Rahad (North Kordofan); Kadugli and Dilling (South Kordofan); Nitega and Tulus (South Darfur); Nertiti and Um Dukhun (Central Darfur); Madeinat Al Gedaref and Al Galabat Al Gharbyah (Gedaref); Kosti (White Nile); and Sharg Alneel, Khartoum and Bahri (Khartoum).



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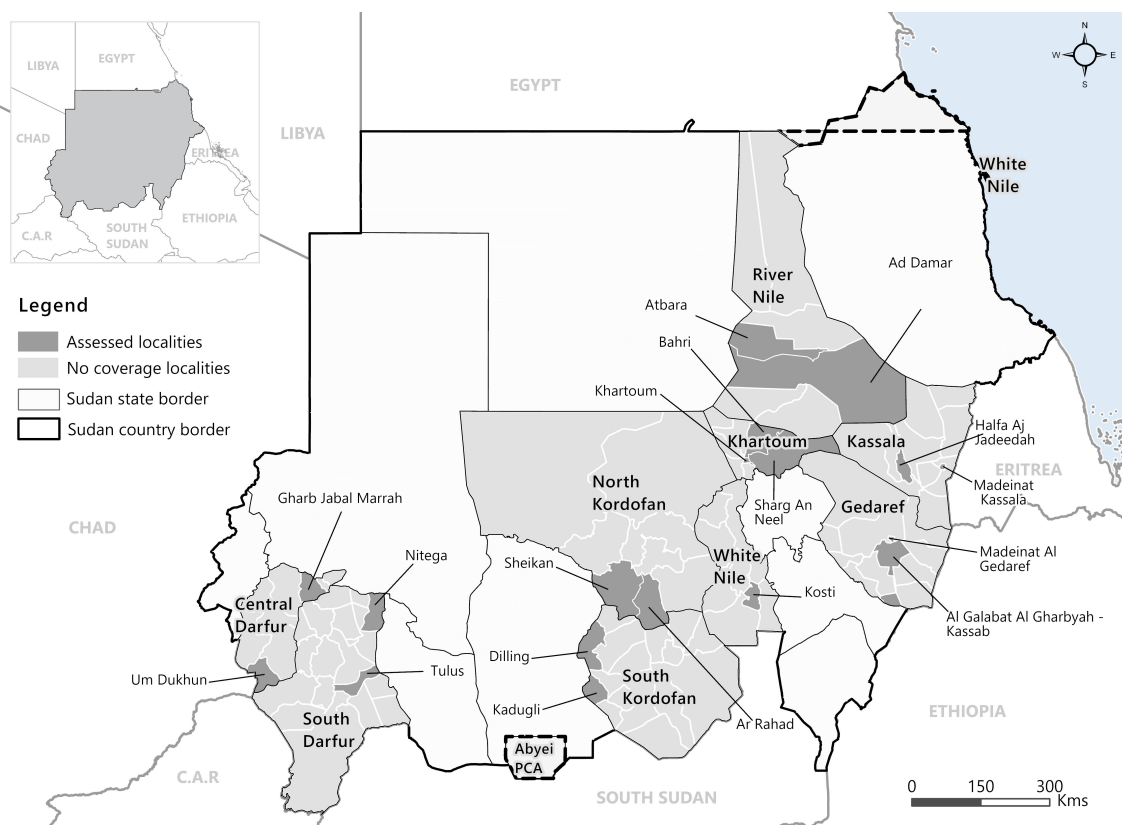


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Figure 1: Coverage map, by state and locality



1.2. Sampling strategy

The assessment covered three primary respondent groups: youth aged 15–35, representing the labour supply; employers, MSMEs, informal enterprises and other market actors, representing labour demand; and institutional stakeholders, including training providers, financial institutions, government entities and other actors shaping the enabling environment. The assessment also incorporated focus group discussions (FGDs) to provide qualitative insights into youth's experiences, aspirations and constraints across different groups.

KEY FOCUS AREAS	TARGET GROUP	SAMPLE SIZE	TOOL
YOUTH LABOUR SUPPLY	Total Youth Survey (Females: 54%, Males: 46%)	2,814 individuals	Quantitative youth survey
	Youth aged 15–19	1,125 individuals	
	Youth aged 20–35	1,689 individuals	
LABOUR DEMAND	Employers and businesses	936 employers	Quantitative employer survey
ENABLING ENVIRONMENT AND QUALITATIVE INSIGHTS	Institutional stakeholders (government, TVET, financial providers, businesses)	66 individuals	KIIs
	Youth, PwD, displaced populations, and other demographic groups	54 focus groups	FGDs

The youth survey addressed 2,814 respondents across the assessment areas. The sampling approach was designed to provide coverage across the assessment areas and capture variation in youth labour market experiences, employment status, skills, aspirations and barriers to economic participation. In the field, enumerators used a random-walk approach, selecting households at regular intervals from identified starting points and randomly selecting one eligible youth within each household where more than one eligible respondent was available.

The youth sample was complemented by an employer survey covering 936 respondents. Employers and businesses were identified through sector-based listings and controlled referral/snowball sampling to ensure coverage of the principal economic sectors and different types of market actors, including MSMEs, informal businesses and traders. Where feasible, the sample also sought to include women-owned and youth-led businesses. This approach was intended to capture variation in employers' capacity, sector, workforce composition, recruitment practices, skills requirements, recruitment and growth challenges, and willingness to support youth employment initiatives. Given the use of controlled snowballing and the concentration of data collection in accessible areas, the employer findings should be interpreted as indicative of the surveyed market rather than as statistically representative of all businesses in the target states.

The institutional component comprised 66 key informant interviews (KIIs) with stakeholders involved in employment, skills development, enterprise development and market systems. Respondents included relevant government and institutional actors, training and technical and vocational education and training (TVET) providers, financial service providers, business development actors and private-sector stakeholders. Additionally, 54 FGDs were conducted, providing qualitative perspectives from youth, persons with disabilities (PwD) and other relevant groups, including IDPs, returnees, and male and female youth groups. Discussions were structured to capture differences by gender, age, disability, displacement status and employment status, enabling the assessment to explore issues that may not be fully captured through the quantitative surveys. Access constraints meant that no KIIs or FGDs could be held in South Kordofan, so findings for that state rest on the youth and employer surveys only.

Youth survey participants were selected through stratified random sampling and employers through sector quotas with controlled referral, both designed to capture different categories of youth and employers. However, operational challenges during the enumeration process meant that the final samples were neither fully representative nor proportionally distributed across the intended sub-groups. Therefore, the findings should not be considered representative of these sub-groups, and disaggregated results should be interpreted as indicative rather than statistically representative, except where gender-specific findings are concerned.

1.3. Data collection methods

Data were collected using four complementary methods: quantitative individual interviews with youth; quantitative individual interviews with employers and MSMEs; KIIs with institutional stakeholders; and FGDs with PwD, IDPs, returnees, and male and female youth. Each method was used to capture a distinct dimension of the labour market system. The youth survey generated quantitative evidence on labour supply, employment experiences, skills, aspirations and barriers to economic participation; the employer and MSME survey examined labour demand, recruitment, workforce composition, skills requirements and business constraints; KIIs explored the institutional, financial, policy and market-system environment; and FGDs provided qualitative insights into youth experiences, perceptions and constraints that could not be fully captured through structured surveys.

Quantitative data collection tools were programmed in KoboToolbox, incorporating validation rules, skip logic and consistency checks to improve data quality during collection. The tools were available in both English and Arabic and were administered through in-person interviews, with remote administration used where required by security and access conditions. KIIs and FGDs followed semi-structured discussion guides organised around

the assessment research questions, allowing for consistency across locations while enabling interviewers and facilitators to probe emerging issues. All data collection tools were developed by IMPACT in consultation with programme partners, reviewed and validated during the design phase, and piloted before full deployment.

Enumerator training and piloting were conducted in June 2026, following which primary data collection was implemented across the nine target states. Data collection, data cleaning, translation and analysis were conducted iteratively, allowing emerging data-quality issues to be identified and addressed during fieldwork. The data cut-off for the analysis presented in this report was 8 August 2026. Further details on data cleaning, removed or excluded records, deviations from the planned sample, and any additional or top-up sampling are documented in the data cleaning logs, available on request.

Additionally, a secondary data desk review was conducted to identify key state-level socioeconomic characteristics and to contextualise and triangulate the primary findings. Sources included the World Bank Group (WB), FEWS NET, the Food and Agriculture Organization of the United Nations (FAO), the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), and IMPACT Initiatives.

1.4. Analysis and reporting

The quantitative analysis primarily used descriptive statistics, including frequencies, counts and percentages, to summarise the characteristics, experiences and perspectives of respondents across the assessment. Because the employer survey used quota-based sampling and several youth subgroups are small, findings are presented as context-specific insights rather than as statistically representative estimates, except for the youth survey at locality level. **Data were aggregated and analysed at state and catchment-area level, with overall study area-level figures used to identify broad patterns across the assessment areas.** Quantitative data were cleaned, translated and analysed using R and Excel, with results presented as percentages or counts. Additionally, qualitative data were transcribed into standardised templates and analysed using ATLAS.ti through an inductive content-analysis approach. Where a figure refers to a subgroup (a state, an activity, a displacement or disability group), the number of respondents is given and figures based on fewer than 30 respondents are marked as indicative; the state annexes apply the same rule, organised thematically and by location, with selected attributed quotes and short section summaries used to illustrate key findings. To contextualise the primary data findings and support analytical triangulation, the assessment also incorporated a review of secondary data sources, particularly focusing on livelihood and economic context, enabling environment, and sectoral contexts in Sudan.

Findings from the four data collection methods were then triangulated within the MSD framework to identify common patterns and differences across youth, employers/MSMEs and institutional stakeholders. The prioritisation of sectors and employment pathways drew on three dimensions: current youth participation, youth preferences and aspirations, and employer demand and growth potential. The resulting pathways were then reviewed with EMPOWER implementation teams at a validation workshop to integrate operational feasibility, as the terms of reference (ToR) require. This approach enabled the assessment to consider both the pathways currently supporting youth livelihoods and those that may offer stronger opportunities for future employment and enterprise development, while taking account of differences in labour market conditions across states.

Sector and employment pathway selection:

A separate ad hoc analysis was also conducted to determine priority pathways by sector and state. To identify sectors with the strongest potential to support youth employment, the assessment applied a consistent framework examining the performance, opportunities, and inclusiveness of different employment pathways. Sectors were assessed against a fixed set of criteria applied across all states rather than ranked by the number of employers or youth engaged in them. The criteria were selected based on their relevance to identifying pathways for youth and sectors with growth potential and strong labour demand from the employers' perspective. To this end, the analysis used employer- and youth-based indicators listed in Annex

I. The resulting score reflects how well a sector performs as an employment pathway for youth, not its size or overall economic importance; therefore, a large sector with weak employment conditions and limited youth inclusion may score lower than a smaller, stable, actively hiring, and more inclusive sector. The scores should not be interpreted as measures of sector size or economic contribution, particularly given the quota-designed respondent sample and predetermined number of employers interviewed in each sector. Cross-state comparisons should also be made with caution, as differences in survey response rates affect the strength and representativeness of the evidence underlying each score. Finally, a high score indicates that a pathway is performing relatively well for youth already participating in it but does not necessarily mean that it is accessible to all youth.

1.5. Challenges and limitations

Level of representativeness and unit of analysis: The samples are not representative of the different categories of youth groups targeted for this assessment. Most notably, PwD, IDPs, and returnees are not proportionally represented, even though the youth survey was designed for a confidence level and margin of error of 90% and 10% at locality level, which was achieved in all localities except Bahri (n=42) and Khartoum locality (n=47). Findings from employer/MSME individual interviews, institutional actor KIs and youth FGDs are used to supplement existing findings and should be treated as indicative.

Comparability across states and level of aggregation: Locality coverage was uneven (one locality in White Nile, three in Khartoum), limiting state-level comparison. Due to the high variation between localities, aggregated state-level analysis should be considered a synthesis of locality-level patterns.

Challenges:

- **Security and restrictions on data collection:** Due to security constraints and restrictions from the authorities, youth and employer/MSME interviews were conducted using paper-based forms in affected locations and subsequently entered digitally into KoboToolbox. Because paper-based data collection could not implement all digital constraints and skip logic, there was a risk of enumerator error or inconsistent application of questionnaire routing. For the analysis, this means that some responses may be affected by data-entry or questionnaire-routing errors that would normally have been prevented through automated checks.
- **Delays in obtaining permissions:** Data collection was planned to begin simultaneously across all states; however, differences in administrative procedures meant that permits took longer to obtain in some states. This delayed fieldwork in some locations and compressed the time available for data cleaning, analysis, and reporting. The findings should therefore be understood as reflecting the data available within the revised fieldwork period rather than a fully simultaneous snapshot across all states.
- **Difficulty achieving planned quotas:** Security conditions, the social context, operational capacity, the initial sampling and randomisation approach, and time constraints made it difficult for field teams to achieve all planned quotas for both youth and employers/MSMEs. This was particularly relevant for PwD, IDPs, different age groups, and returnees on the youth side. As a result, some subgroups have insufficient observations to support reliable disaggregation, and findings for these groups should be interpreted cautiously rather than as representative subgroup estimates.
- **Uneven representation of displaced populations:** Displaced respondents are over-represented in some states, while other groups, including returnees, have relatively small sample sizes. Consequently, differences between states or population groups may partly reflect differences in sample composition rather than underlying differences in the wider population.

- **Coverage differences across states:** Only Kosti locality was covered in White Nile, whereas Khartoum State was covered across Sharg Alneel, Khartoum, and Bahri localities. The findings therefore do not provide equivalent geographic coverage across states and should not be interpreted as representing all localities within each state.

Methodological and data limitations:

- **Different levels of representativeness across respondent groups:** Only the youth survey was designed to be representative at the locality level, at a 90% confidence level and 10% margin of error. Findings from Employer/MSME Individual Interviews (IIs), institutional KIIs, and youth FGDs are indicative rather than statistically representative. Readers should therefore interpret these findings as describing the perspectives and experiences of the assessed respondents, rather than as estimates of the prevalence of those views or characteristics in the wider population.
- **Employer/MSME samples are quota-based:** Employer/MSME samples were quota-designed across states. As a result, the proportion of businesses observed in each sector reflects the sampling frame and study quotas rather than the actual structure or relative size of the local economy. Sector shares in the sample should therefore not be used to estimate the size of sectors, market shares, or the relative prevalence of economic activities in a state.
- **Employer survivorship:** The employer survey reached businesses that were operating in July 2026. UNDP estimates that around one in three Sudanese firms has closed since April 2023 and that 88% of firms that were displaced closed; the sample therefore describes survivors, and indicators such as the share of businesses that are stable or expanding, or that have operated for more than six years, overstate the health of the private sector as a whole. Differences between sectors and states are more reliable than the levels.²⁴
- **Limited subgroup analysis:** The achieved sample sizes for some groups were insufficient to support robust analysis by PwD status, displacement status, age group, gender, or other characteristics. The report therefore limits or avoids detailed comparisons for groups where the sample is too small, and findings for smaller subgroups should not be generalised to their wider populations.
- **Self-reported information:** All findings are based on respondents' self-reported information. This creates the potential for recall, reporting, and social desirability biases, including under- or over-reporting of certain indicators. This may be particularly relevant to sensitive topics such as discrimination and challenges in engaging with local stakeholders. Reported values should therefore be interpreted as respondents' reported experiences or perceptions rather than independently verified measures.
- **Proxy measures and sector aggregation:** The assessment was designed to inform a specific programme intervention and therefore uses proxy indicators to assess labour supply, employment viability, and priority pathways rather than comprehensive labour-market measures. Economic activities were also grouped into broader sectors/divisions to enable comparison across the Employer and Youth tools. The resulting pathway and sector findings should therefore be interpreted as programme-oriented indicators of relative viability and opportunity, rather than as comprehensive measures of sector performance or labour-market conditions.

Conceptual limitations:

- **Scope of labour-market analysis:** The assessment was designed to inform specific programme interventions and therefore does not cover all components of the wider labour market. Macro-level factors, including broader economic trends, national labour-market dynamics, inflation, monetary

²⁴ UNDP, [Sudan Private Sector Engagement Strategy](#) 2026–2028 (April 2026).

conditions, and other factors outside the scope of the intervention, are not comprehensively assessed. Consequently, the findings should not be interpreted as a complete diagnosis of labour-market conditions or as establishing the relative contribution of macroeconomic factors to employment outcomes.

- **No estimation of official employment or unemployment rates:** The assessment was not designed to estimate youth employment or unemployment rates. The methodology uses proxy indicators, including employment status and other measures of labour-market experience, to identify labour supply characteristics and potential employment pathways. The resulting figures should therefore not be cited as official employment or unemployment statistics or directly compared with nationally representative labour-force estimates without accounting for the differences in methodology and population coverage.
- **Interpretation of pathway viability:** Sector and employment pathway scores combine multiple indicators relating to employer demand, employment conditions, youth experiences, and preferences. These scores are intended to support identification of potentially viable pathways for programme purposes; they do not establish that a sector will generate a particular number of jobs, that employment in the sector is sustainable in the longer term, or that one sector is economically larger than another.
- **Cross-sectional nature of the assessment:** The assessment captures conditions and experiences at the time of data collection rather than tracking respondents or businesses over time. Observed relationships should therefore be interpreted as associations or patterns in the assessed data and should not be taken as evidence of causal relationships or long-term trends.

1.6. Purpose and intended use of findings

This assessment is designed to inform key decision-making processes within the EMPOWER programme, its consortium partners (DRC and Mercy Corps), and other stakeholders involved in youth livelihoods and market systems development. In particular, the findings will support the prioritisation of sectors and livelihood pathways, the design and targeting of cash for work and skills development interventions, and the development of MSME support models that are responsive to local market conditions and opportunities. By generating evidence on labour demand, youth skills and aspirations, employment and enterprise pathways, and systemic constraints across the target states, the assessment will strengthen understanding of localised labour market and market systems dynamics and enable more targeted, evidence-based, and context-specific programming. Furthermore, the assessment will help align programme interventions with viable economic opportunities and strengthen pathways from short-term income support towards sustainable youth employment and enterprise development.

Research questions

The research questions this assessment set out to answer are listed in full in the validated terms of reference, available at this [link](#).



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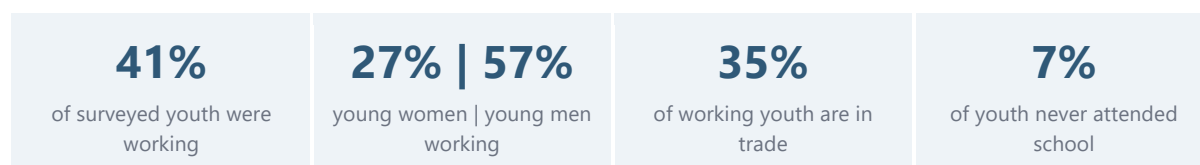
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FINDINGS

This section presents findings from the assessment, examining youth livelihoods and labour market dynamics from both the labour supply and demand perspectives. The analysis first presents youth labour supply profiles, covering both young people in employment and those who are not currently employed. The demand-side analysis then examines employers' perspectives on labour demand, recruitment and hiring dynamics across key economic sectors. A separate section considers the enabling environment shaping these dynamics, including market access, access to finance, and the policy and regulatory conditions within which youth and employers operate. The final section compares viable employment and livelihood pathways across the nine states and identifies the key constraints affecting each sector and pathway.

1. Youth labour supply profile



1.1. Education and human capital

Although educational outcomes among interviewed youth generally vary across enrolment, dropouts, never attended school and educational attainment,²⁵ some themes emerge across the nine states covered. **Overall, 7% of surveyed youth had never attended school, and the gap is strongly gendered: 10% of female youth compared with 5% of male youth, so that women make up 70% of those who never attended.** Among youth not currently attending school (56%), 87% had attended school at some point²⁶, with secondary education the most commonly attained level (35%), followed by primary (27%) and higher education (20%). Attainment among those who did attend differs little by gender (secondary 34% of female and 35% of male youth; higher education 21% and 19%), which means the education gap is concentrated at the point of entry rather than in progression. Central Darfur stands out: 23% of all surveyed youth there had never attended school (27% of female and 14% of male youth), rising to 29% among those not currently attending (33% female, 19% male). In Central Darfur, never having attended was most often attributed to families not allowing schooling (29%), the cost of schooling (19%), illness (13%) and school closures due to the conflict (10%). These findings align with UNICEF's Humanitarian Situation Report issued in August 2026, which stated that school closures, a cholera outbreak, and economic challenges, including the non-payment of teacher incentives, remain the main challenges.²⁷

Reasons for never attending school diverge sharply by gender. Among girls who never attended, the leading reason is family prohibitions (22%), followed by cost of education (19%) and illness (15%). Among male youth, cost is by far the dominant reason (30%), followed closely by illness (27%).

A large proportion of youth (74%) dropped out before completing school, with reasons for dropouts highlighting gendered differences. Among females, the leading reason was lack of money or school fees

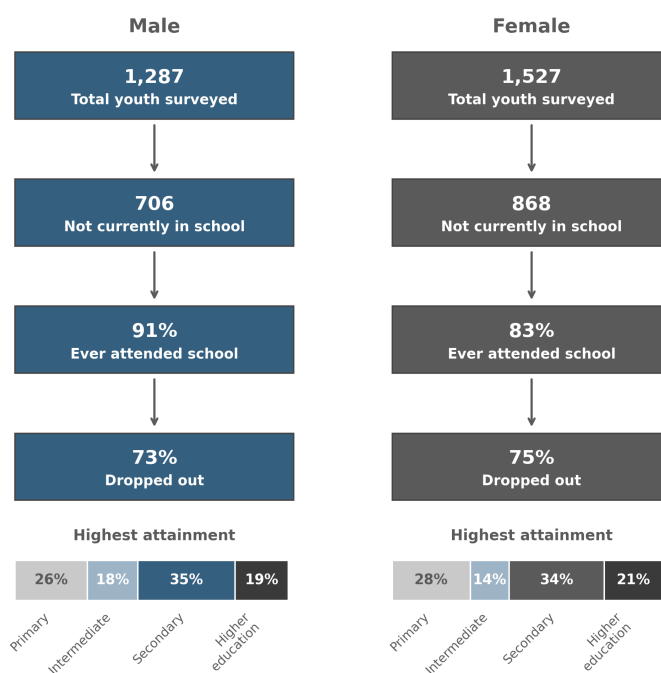
²⁵ Current enrolment/attendance status: self-reported current attendance in school or any educational programme. Dropouts: refers to respondents who report having attended school in the past but not currently attending. Never attended: refers to respondents who have never attended school or any educational programme. Educational attainment: is the highest level of education a respondent reported having completed by the time of data collection.

²⁶ In this context, ever attended school refers to whether the youth have attended school or another educational institution at any time in the past but are not currently attending.

²⁷ UNICEF, [Humanitarian Situation Report No. 34](#) (August 2026).

(43%), followed by early marriage (13%) and displacement (11%). Among male youth, lack of money or school fees was dominant (29%), followed closely by the need to find employment (26%).

Figure 2: Educational profile of youth assessed



Youth survey, n=2,814. Ever attended and dropped out are shares of youth not currently in school (706 men, 868 women); attainment is among those who ever attended (643 men, 721 women); 2-3% of them had no formal education.

Willingness to return to education is high overall across the study area, and considerably higher among female youth (77%) than male youth (53%). This suggests that women are far less likely to be enrolled in school, but, among those who dropped out, they express a stronger inclination to continue education, having been out of school for a similar length of time on average. Overall, findings suggest that the education and human-capital picture is one of a gender gap concentrated almost entirely at the point of entry, with female youth twice as likely as men to have never attended school. Education also shapes who works, but very differently for women and men: among female youth, 41% of those with higher education were working compared with 18% to 28% of those with primary, intermediate or secondary education, whereas among male youth the share working is high at every level (59% to 71%). For young women, education is therefore one of the few levers that visibly widens access to work; for young men it barely changes it. This has implications for livelihoods programming: interventions should take into account young people's differing levels of educational attainment, their reasons for leaving or being excluded from education, and their expressed interest in returning to education. Where feasible, livelihoods support could therefore be adapted to different educational profiles and linked with opportunities for skills development or continued learning.

1.2. Employment status

Employment status varies considerably across states and by gender. In this assessment, youth are counted as working if they reported currently engaging in any income-generating activity for pay, profit or family gain; this includes self-employment (47% of working youth), casual or daily labour (26%), regular wage employment (22%) and unpaid work in a family business or farm (5%), so the figures are broader than formal employment.

Overall, 41% of surveyed youth were working at the time of the survey and 59% were not. The 59% includes young people who are studying or not looking for work, so it is not an unemployment rate (see section 1.5). It nevertheless indicates a substantial gap between the available labour supply and young people's access to income-generating opportunities. **Among those currently working, access to employment was most commonly facilitated through family or relatives (41%) and self-started businesses (25%), followed by friends or personal networks (17%) and employers approaching respondents directly (8%).** Only 7% of the youth reported securing their current job or business activity through direct application, while 1% reported accessing employment through a government programme. This reliance on family and personal networks, alongside self-employment, suggests that formal recruitment channels play a limited role in connecting youth to employment opportunities.

At the state level, the share of youth working ranged from 57% in Kassala to 26% in Gedaref (Table 1). A pronounced gender gap is evident everywhere: 27% of female youth were working compared with 57% of male youth. In Gedaref only 8% of young women were working, the lowest share across the assessed states, while Khartoum recorded the lowest share of working male youth (45%). Findings therefore point to substantially lower labour market participation among female youth, alongside significant variation across states. Because the pooled figures give more weight to the larger state samples (422 respondents in Kassala against 151 in White Nile), the simple average of the nine state values was also calculated; it is within one percentage point of the pooled figure for youth overall, for young women and for young men, so the national figures are not being driven by sample size. The low share of working youth in Gedaref reflects, above all, youth still in education: 42% of non-working youth there gave education or training as their main reason for not working (41% of young women), followed by not finding suitable work (17%) and household responsibilities (14% overall, 21% among young women). Young women in Gedaref described what keeps them out of work: "a major challenge in finding work opportunities, given the absence of connections and the absence of capital", market work seen as unsuitable for women, and families that "do not allow women to work, given the danger of work on the [irrigation] schemes"²⁸.²⁹ In Khartoum, where more than a third of respondents are returnees, young men in Bahri described looted shops, closed factories and workshops that cannot restart without electricity or spare parts: "I was displaced to another state and returned recently. I found my shop looted and I need new capital to start again from zero."³⁰

Displacement status makes less difference to the likelihood of working than gender: 39% of internally displaced youth were working compared with 42% of host-community youth and 49% of returnees (n=107). Disability does: among youth reporting at least some functional difficulty on the Washington Group questions (n=400), 24% were working compared with 44% of youth without difficulty, and among those unable to function at all in at least one domain (n=132) the share falls to 20%. Youth with a functional difficulty are also worse off when they do work and less likely to have been trained: among the 81 who reported an income, 67% earned under SDG 200,000 a month against 47% of other working youth, and only 14% had attended vocational training in the past 18 months against 21% of other youth, although both groups report a TVET centre available locally at similar rates (24% and 27%). Almost three in five youth with a functional difficulty (59%, n=400) said it affects their access to jobs or services, most often through physical access barriers (58%), communication barriers (34%) and stigma or discrimination (33%); 74% of displaced and returnee youth (n=107) said their displacement has affected their ability to secure work, overwhelmingly through the loss of assets or capital (80%), followed by mobility constraints (36%), discrimination (31%) and the loss of networks (29%). Youth themselves rank young people with disabilities as the group facing the greatest difficulty accessing jobs (35%), ahead of young women (21%) and youth with low education (18%), and 41% believe

²⁸ The New Halfa and Gash agricultural schemes in Kassala, where much of the paid agricultural work available to young women is located.

²⁹ In this context, scheme refers to the large-scale mechanised or irrigated agricultural projects/farms that dominate the region's economy.

³⁰ Adam B. & Lovise A., [When refuge is home: Sudan's war-affected IDPs in Gedarif state. Eastern Sudan](#) (2024).

employers treat some groups unfairly, naming youth with disabilities (44%) and young women (36%) most often.

Employment outcomes vary substantially by age, with adolescents aged 15–19 showing considerably lower levels of labour market participation than older youth. Among 15–17-year-olds (n=542, approximately one-fifth of the sample), 24% were working, including 17% of girls and 34% of boys, while 65% were attending school. The proportion working increased to 38% among 18–19-year-olds and to 48% among those aged 20–35, with a notable gender difference among the latter group (33% of women compared with 65% of men). Among working youth aged 15–19, employment was concentrated in petty trade (41%) and non-agricultural casual labour (12%). These figures describe the type of work adolescents (aged 15–19) were engaged in, while the 31% working under casual or daily arrangements refers to the nature of their employment relationship. Working adolescents were also more likely than older working youth to be in lower-paid and part-time work: 66% earned less than SDG 200,000 per month, compared with 39% of those aged 20–35, while 69% worked fewer than 35 hours per week. In addition, 26% reported carrying heavy loads, indicating exposure to physically demanding work among a proportion of working adolescents.

The labour market position of youth aged 15–17 also differs from that of older youth who were not working. Among non-working 15–17-year-olds, 48% reported that they were not working because they were studying, while 58% were not looking for work. Among non-working youth aged 20–35, 29% reported not looking for work. Taken together, these findings indicate that schooling remains a major factor shaping the labour market participation of younger adolescents, while those who do work tend to be concentrated in informal, lower-paid and more precarious forms of employment. For programming this means the 15–17 group is largely a schooling and protection cohort rather than a placement cohort, and that any engagement with working adolescents has to start from the conditions of the casual work they already do.

Table 1: Employment status, by gender and state

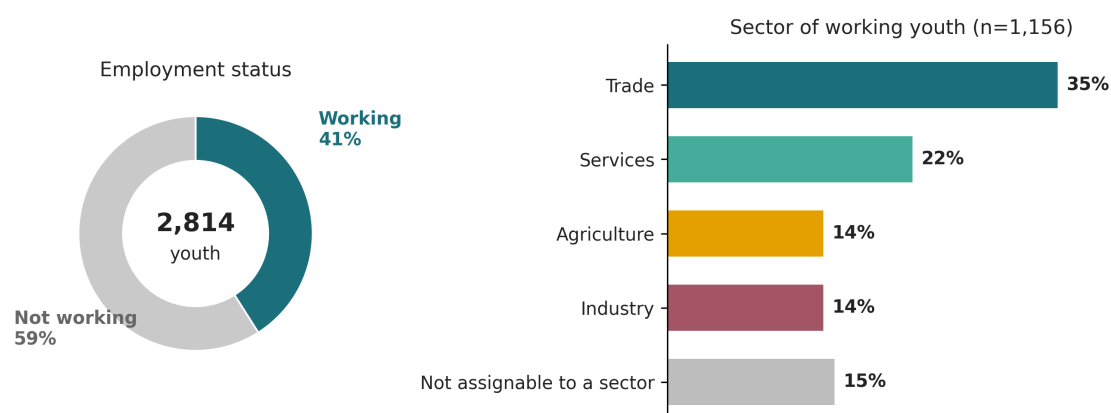
State	Female working	Male working
Overall	27%	57%
Central Darfur	29%	45%
Gedaref	8%	46%
Kassala	44%	70%
Khartoum	30%	45%
North Kordofan	22%	53%
River Nile	19%	57%
South Darfur	30%	64%
South Kordofan	34%	66%
White Nile	22%	62%

1.3. Sectoral distribution of employment

Employed youth are heavily concentrated in a small number of informal activities. At the level of the study area, and using the International Standard Industrial Classification (ISIC) divisions applied in section 1.4, trade is the largest sector (35% of working youth, almost entirely petty trade), followed by services (22%: food preparation 8%, repair and technical work 4%, teaching 3%, engineering and technical professions 2%, health-related work 2%, and transport, ICT and office work 1% each), agriculture (14%: crop farming 11%, livestock 2%, agricultural wage labour 1%) and industry (14%: construction and manual labour 11%, tailoring 2%, mining 1%). A further 15% of working youth reported activities that cannot be assigned to a sector (non-agricultural casual labour 7%, unspecified salaried employment 3%, other 5%). These findings are consistent with the FEWS NET report, which highlighted that labour markets are predominantly moving to the informal business and service activities. Ongoing conflict and long-term structural changes in the economy have reduced the

capacity of the formal sector, particularly agriculture, to absorb labour, increasing reliance on low-wage, informal employment arrangements.³¹

Figure 3: Reported employment status and sectoral distribution of youth



Not assignable: non-agricultural casual labour 7%, unspecified salaried employment 3%, other 5%. Industry: construction and manual labour, tailoring, mining.

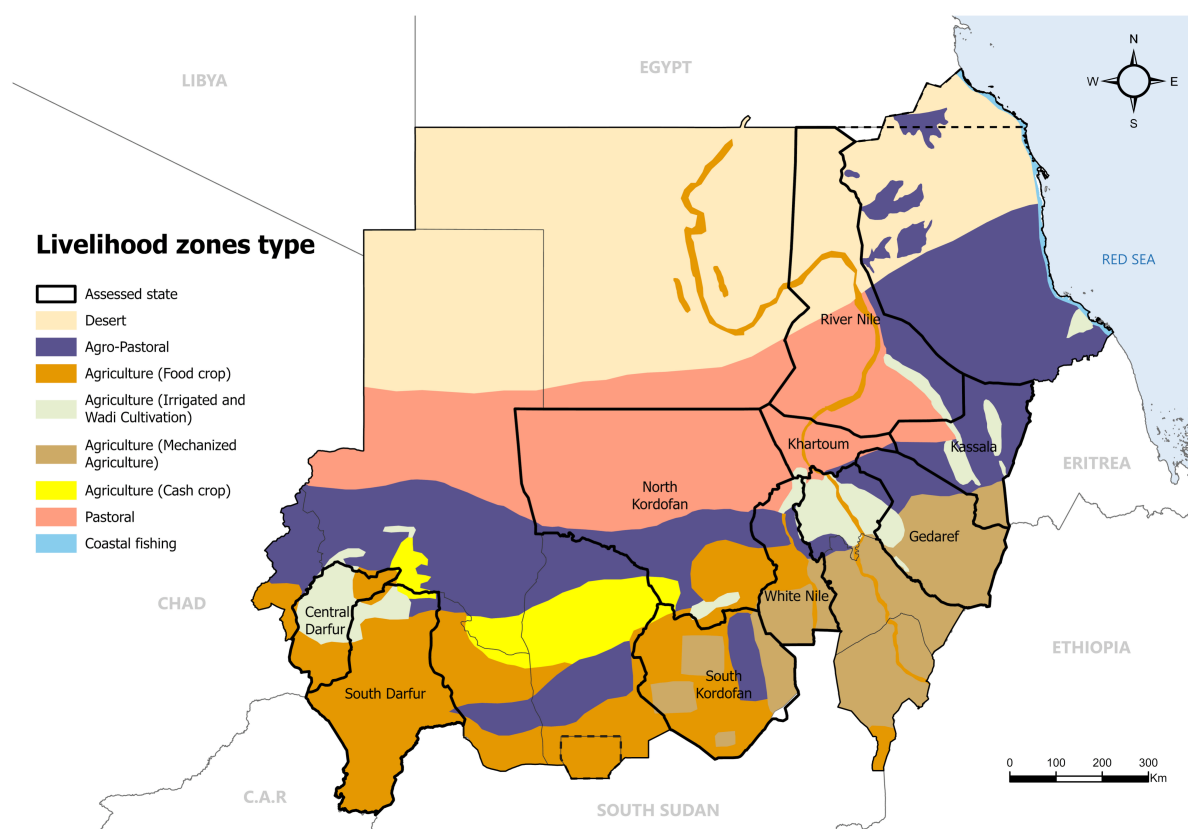
The gendered pattern across these larger divisions is sharp: industry is dominated by male youth (82%), driven mainly by construction, and trade and agriculture are mostly male (63% and 64% respectively). Services is the only division approaching gender parity across the study area (52% male, 48% female). Female youth within the services division cluster around care and food-related roles, while male youth dominate the technical and repair-oriented roles.

1.4. Main livelihood activities: deep dive

Youth respondents defined their main livelihood activity across a wide range of income-generating activities. The economic activities were aggregated and categorised according to the ³²ISIC, grouping them into four broad divisions: trade, agriculture, services and industry (construction, manufacturing and mining), with activities that cannot be assigned to a division (casual labour, unspecified salaried employment, other) shown separately. The sections below assess each in turn: the trade sector through petty trade, the agriculture sector through crop farming, and the service sector overall.

³¹ FEWS NET, [Sudan Food Security Outlook](#) (2026).

³² UNSTATS, [International Standard Industrial Classification \(ISIC\)](#) (2023).

Figure 4: Main livelihood zones of the states³³

1.4.1. Trade sector: petty trade

Petty trade in Sudan comprises small-scale commercial activities that generally require limited start-up capital and few formal qualifications, making it one of the more accessible livelihood entry points for youth. The educational profile of petty traders is broadly similar across genders, with secondary education being the most attained level (42%), followed by primary education (23%) and higher education (21%). Additionally, 38% of young petty traders were enrolled in education during the time of data collection, indicating that petty trade is also used as a source of income alongside ongoing education for a substantial proportion of youth.

Employment arrangements among the youth in this economic activity are predominantly based on self-employment, although there are notable gender differences. Self-employment was reported by 70% of female youth compared with 55% of male youth.³⁴ Male youth were more likely to engage in casual labour (20%) and regular waged employment (22%), while among female youth, 16% reported casual labour and 8% regular waged employment. **This suggests that while petty trade provides a common entry point for both genders, female youth are more concentrated in self-employment and have fewer reported links to waged employment.**³⁵ Among petty traders working as casual, wage or unpaid family workers, most considered themselves to have the skills needed to start their own business (66% of male and 69% of female

³³ FEWS NET, [Sudan Livelihoods Zones Map](#) (2014).

³⁴ In this assessment, casual labour refers to employment that is temporary, irregular, and typically arranged on a day-to-day or short-term basis.

³⁵ Business skills refers to the survey option 'business management' (planning, record keeping, pricing, managing stock and staff); marketing and financial management were separate options in the same question.

youth). Self-employed petty traders identified several areas where additional skills could support business growth, particularly marketing (45%), financial management (40%), and general business skills (31%). **Access to finance was by far the most frequently reported constraint to business growth, cited by 94% of respondents, compared with lack of skills (32%) and limited business opportunities (30%).** This indicates that limited access to capital is a substantially greater constraint on the expansion of petty trade businesses than perceived skills deficiencies.

The perceived sustainability of petty trade is mixed. Nearly half of youth (49%) reported irregular income, while 29% described their income as stable and 17% as seasonal.³⁶ Nevertheless, 66% had remained in their current employment for more than six months, suggesting a degree of continuity despite the instability of earnings. Perceptions of workplace safety were generally positive, though with notable differences by gender. While 67% of female and 76% of male petty traders described their working conditions as safe and decent, 25% of women and 21% of men reported some risks and 8% of women and 3% of men considered their workplace unsafe. Asked what their work involves, 60% of female and 48% of male petty traders reported none of the listed hazards; the most common were long hours or night shifts (17% of women, 22% of men) and carrying heavy loads (10%, 18%), and for women specifically exposure to conditions harmful to health or safety (8%) and working with dangerous tools (5%). Young women in focus groups linked risk to place rather than task: street vending in crowded markets and travelling early or late were repeatedly described as exposing them to harassment (Kassala, Central Darfur). So while the majority feel secure, roughly a third of young women in petty trade encounter some degree of risk in their day-to-day work.

At the same time, willingness to move from petty trade into another livelihood pathway was relatively high, reported by 61% of female and 57% of male petty traders (n=237). Most of those wishing to change do not want to leave trade but to move into a larger or different trading activity (62%); 13% aspire to services, 5% to manufacturing, 4% to agri-business and 4% to running a formal business, while 5% said they would take any available opportunity. The main motivation was the prospect of a higher income (55%), followed by a more stable and predictable income throughout the year (19%), personal interest (14%) and socially acceptable work (7%); only 3% said the preferred activity needs fewer resources. Income findings highlight a pronounced gender disparity in both earnings and the amount of work undertaken. Most (70%) of female petty traders reported monthly earnings below SDG 200,000 (approximately USD 46), compared with 29% of male petty traders, while only 11% of women fell in the SDG 201,000–500,000 (approximately USD 46 to 115) band compared with 43% of men³⁷. Part of this gap is a difference in the volume of paid work (the number of days with paid work in the previous 30 days): in the 30 days before the survey, male petty traders had secured paid work on 14.4 days on average against 8.8 days for women, and 65% of women worked fewer than 35 hours a week compared with 30% of men (30% of women worked under 20 hours). This suggests that the gap partly reflects men securing paid work on more days, rather than only lower pay per day; 86% of women and 87% of men said they would work more hours if the opportunity existed. The capital invested in the business, which also shapes earnings, was not collected in the survey and is flagged as an information gap for follow-up.

1.4.2. Agriculture sector: crop farming and cultivation

Crop farming encompasses the cultivation of food and cash crops and is highly dependent on access to land and seasonal rainfall, contributing to the instability and seasonality of this livelihood pathway. It was **the second most commonly reported livelihood activity** among surveyed youth, accounting for 11% of working youth.

³⁶ Irregular income refers to unpredictable, day-to-day earnings; stable income denotes consistent, regular earnings; and seasonal income reflects earnings tied directly to specific agricultural seasons or cyclical market demands.

³⁷ Sudan Tribune, [Sudanese pounds hits record low as war cripples production](#) (10 June 2026). The exchange rates are calculated based on this news article.

The educational profile of youth engaged in crop farming is relatively low compared with those engaged in petty trade. Around one-third (35%) reported currently being enrolled in education. Among those not currently enrolled, primary education was the most commonly attained level (34%), followed by secondary education (27%) and higher education (20%). **There is a pronounced gender disparity in educational attainment: 38% of female youth engaged in crop farming had never attended school, compared with 14% of male youth.** This indicates an additional constraint for female youth seeking to improve their productivity or transition into higher-return agricultural activities. Of the 128 young people whose main activity is crop farming (48 women, 80 men), just over half run their own farming activity (54% of women, 52% of men). The rest work for others: a third of the women (33%) are casual or daily farm labourers, compared with 20% of men, while men are more often unpaid family workers on the household farm (15% against 6% of women) or regular wage workers (12% against 6%). Women's participation in crop farming is therefore more often as hired daily labour, the least secure arrangement, with weaker control over land, inputs and the income from the harvest.

Willingness to transition away from crop farming is high among both female youth and men, at 79% and 74%, respectively. This indicates that, despite agriculture being an important livelihood source, many young people do not view crop farming as a sustainable long-term pathway. Perceptions of skills adequacy also reveal a gender gap: among crop farmers working as casual, wage or unpaid family workers, 74% of male youth said they have the skills to start their own business, compared with 59% of female youth. Technical skills (41%), financial skills (40%), and business skills (35%) were the three most frequently identified areas needed to improve business performance.

Crop farming also provides relatively low and irregular income. Some 60% of female youth and 51% of male youth reported earning less than SDG 200,000 per month (a further 29% of women and 10% of men declined to give a figure). The number of paid workdays was also substantially lower among women, at an average of 4.9 days per month compared with 8.9 days among men. This difference points to a gendered disparity in access to paid agricultural work and income-generating opportunities. These findings indicate that **crop farming provides an important entry point into livelihoods for youth but is characterised by low incomes, seasonal and irregular employment, high willingness to transition to alternative activities, and gender disparities in education, skills and access to paid work.** Strengthening this pathway would therefore require interventions that address both productivity and market constraints, particularly access to technical, financial and business skills, while also improving female youth's access to land, inputs and paid farm work and more consistent sources of income.

Across all working youth who would like to change activity (63% of those working, n=726), the destination is overwhelmingly trade: 57% named a trading activity, followed by services (12%), manufacturing (6%), engineering and technical work (5%), agri-business (5%) and running a formal business (5%). Even among crop farmers wanting to move, 70% named trade and only 9% agri-business. Higher income (53%) and more stable income (23%) are the main motivators, with personal interest (14%) and social acceptability (6%) far behind. Asked what support would most help them secure the type of work they consider suitable, youth overwhelmingly asked for cash (65%, rising to 71% among those wanting to change activity), then training (15%) and tools or equipment (7%); credit was named by only 1%, which says as much about the terms on which credit is available as about demand for it. At the same time 71% of working youth said they would accept a temporarily lower income in exchange for hands-on training from a local business owner or craftsman, which points to apprenticeship-type placements as an acceptable route.

1.4.3. Services sector

Unlike petty trade and crop farming, which are single activities within their sectors, services is a division that groups several distinct activities. Services bring together food preparation, health work, teaching, repair and technical services, and administrative/office work and is gender balanced overall (48% female, 52% male). The activities differ sharply by gender: among the 119 women in services, 51% work in food preparation, 20% in

teaching and 18% in health-related work, whereas among the 131 men, 34% are in repair and technical work, 20% in food preparation, 18% in engineering and technical professions, 9% in transport and 7% in ICT.

Employment arrangements differ sharply by gender within services: women are far more likely to be self-employed (55%) than men (30%), while men are considerably more likely to hold regular waged positions (43% men vs. 27% women). Despite this difference, only 24% of youth in services had changed activity in the previous 12 months, and the share wishing to change activity (52%) is lower than among petty traders (58%) and crop farmers (76%), indicating that employment within the service division is somewhat more stable than in the other activities. Work stability highlights a large proportion (43%) reporting irregular wages, 34% stable and 20% seasonal, broadly comparable to other activities.

Job duration also shows a marked difference: men are more likely to have held their current roles over six months (74% males, 59% females), while women are more represented in shorter tenures (17% women vs. 8% men for 1–3 months). The tenure gap does not appear to be explained by the employment arrangement: women report shorter tenure than men within self-employment, regular wage work and casual work alike, although the numbers in each arrangement are small (n=17 to 66 women per arrangement). Nor is it explained by care responsibilities alone: two-thirds of women in services (67%) carry regular household or care responsibilities, of whom 38% said these reduce their working hours, 25% that they prevent participation in training and 24% that they limit travel, but men in services report almost identical levels (66%) and effects. A plausible driver is the type of activity: women are concentrated in food preparation, which is largely self-employed, intermittent and dependent on small working capital, so activities stop and restart more often.

1.4.4. Skills alignment and gendered gaps across the three activities

Figure 5: Reported job-skills alignment, by main activity

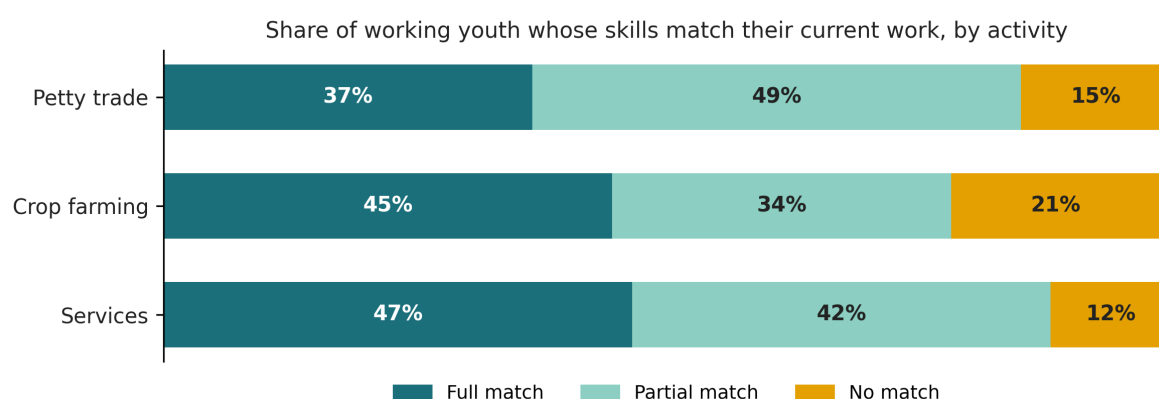


Figure 5 shows, for each of the three activities, the share of working youth who said their skills fully, partially or do not match their current work: petty traders are the least aligned (37% full match, 49% partial, 15% none), against 45%, 34% and 21% for crop farmers and 47%, 42% and 12% for youth in services. **Among youth in services, then, 47% said their skills fully match their current work and a further 42% partially, with no major gender difference.** Among those self-employed (n=105) the leading skill needs for growth are marketing (40%), technical skills (38%) and financial management (32%). Some 43% of all youth employed in this division are also currently engaged in some form of education. Similar to other activities, lack of capital is the overwhelming constraint to sustaining or growing a business (93%). **Income shows the sharpest and most robust gender gap of any indicator analysed for the service division.** Women are heavily concentrated in the lowest income band with over half (52%) earning under SDG 200,000 ³⁸(approximately USD 46) per month,

³⁸ Sudan Tribune, [Sudanese pounds hits record low as war cripples production](#) (10 June 2026). The exchange rates are calculated based on this news article.

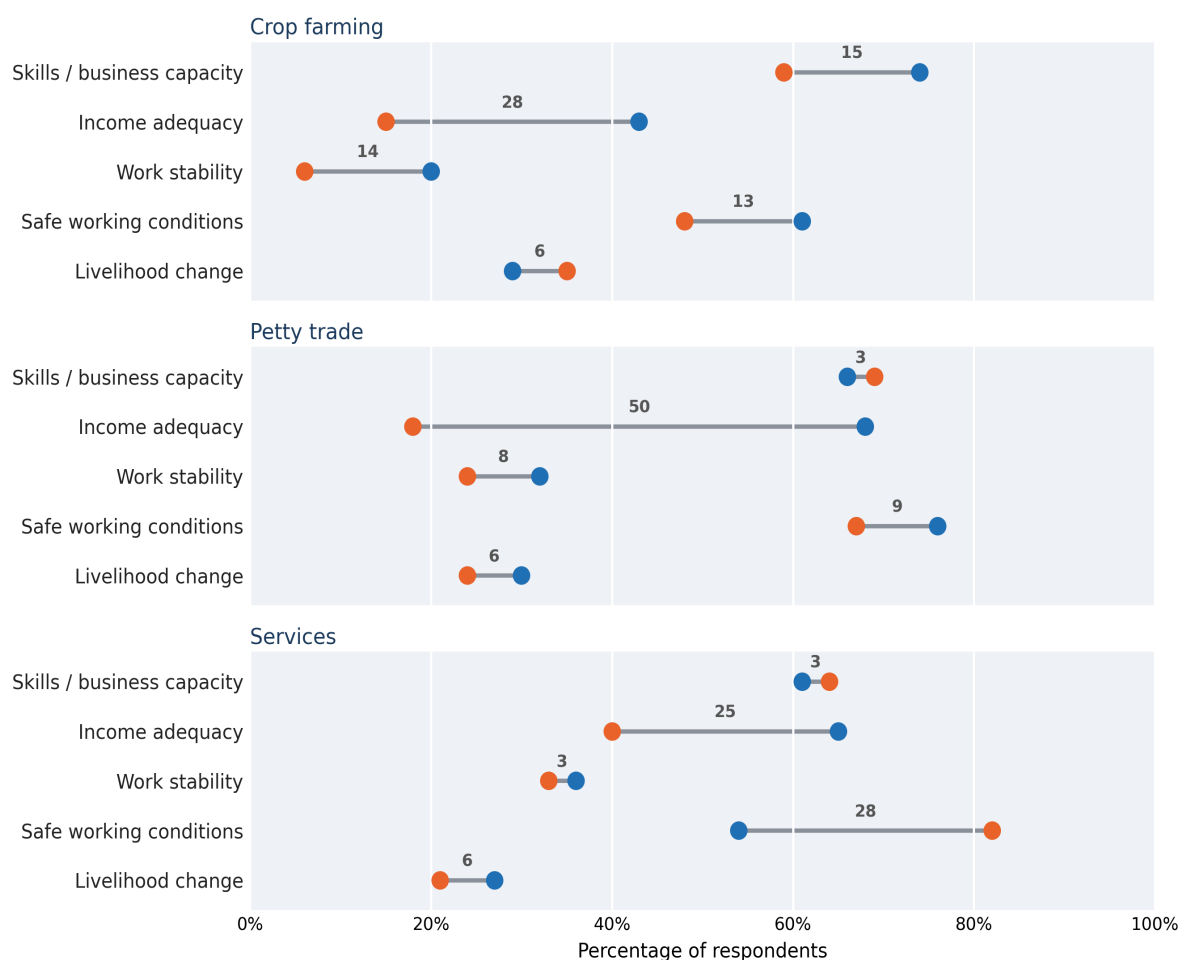
compared to 32% of men. Men in turn are considerably more represented at the top of the income bands: 11% earn SDG 501,000–800,000 while 10% earn over SDG 800,000 per month (compared to 2.5% of women in each band). The gap is partly compositional: women in services are concentrated in food preparation (51%), teaching (20%) and health work (18%), which are mostly self-employed or low-paid activities, while men are concentrated in repair, engineering and technical work and transport, where regular wages and the higher income bands are more common. This suggests that the income gap reflects something other than a difference in competence or effort, with women's greater concentration in self-employment indicating more irregular and typically lower earnings than regular waged workers.

The service industry presents a more complex gendered perspective than other activities: education, perceived skill adequacy and growth-skill needs show no meaningful difference between men and women. However, employment arrangements, income and job duration diverge sharply, with women in the service division pushed disproportionately into self-employment which evidence suggests is associated with lower pay and less job continuity.

What drives this concentration is visible elsewhere in the youth data. Among all young women, 30% said gender roles affect their ability to secure work, and of these the most cited effects were household responsibilities (33%), restrictions on mobility (21%), a limited range of socially acceptable jobs (15%) and not being allowed to work at all (15%). Just over half of young women (53%) have regular care responsibilities, and where these exist 42% said they reduce available working hours. Access to the means of growing a business is also thinner: 55% of young women use no financial service at all, and among those without market access transport cost (52%) and distance (44%) dominate. Focus group discussions described the same mechanism. In Kassala, women "face cultural and social norms, limited safe transport, safety and security concerns [...] and family responsibilities"; in Gedaref, "mixed work with boys is not allowed" for girls in Yathrib, and in Gadambalia "some families do not allow women to work, given the danger of work on the [irrigation] schemes"; and men in Kassala noted that vocational training in blacksmithing, panel beating or car mechanics is easy for men "because their movement is free and they are not held back by travel restrictions or by spending long hours outside the home". Self-employment from or near the home is therefore often the only arrangement compatible with these constraints, which is why women cluster in food preparation, tailoring, henna and other personal services, and why they are under-represented in the regularly waged technical roles that pay better.

Implications for programming. The supply-side picture points to three things. First, the binding constraint on working youth is working capital, not skills: 93% of self-employed youth (n=540) name finance as their main business challenge and cash is the support most youth ask for, so any skills intervention needs a financing or asset component to convert into income. Second, the gender gap is a gap in entry and in hours, not in skills or preference: women want to work more (86% of female petty traders would work more hours), so the levers are mobility, safety, care and access to capital rather than motivation. Third, youth do not want to leave trade; they want to grow within it, so support to petty traders (stock finance, market linkage, bookkeeping) is a legitimate pathway in its own right rather than a stepping stone to somewhere else.

Figure 6: Gendered gaps across youth employed by economic activity



Working youth by main activity (crop farming n=128, petty trade n=406, services n=250). Skills: casual, wage and unpaid workers who say they have the skills to start a business; income adequacy: above SDG 200,000 a month among those reporting income; livelihood change: changed activity in the last 12 months.

1.5. Youth out of employment

This section profiles the 59% of surveyed youth aged 15–35 (n=1,658) who were not engaged in employment or income-generating activities during the data collection period, along with reasons for unemployment and future aspirations. While this measure may not be directly comparable to the overall unemployment rate, it reflects the broader challenges facing Sudan's labour market. For instance, the World Bank reported an overall unemployment rate of 47% in 2024, representing a significant increase from 32% in 2022.³⁹

Furthermore, while these findings provide clear evidence regarding barriers to wage employment, distinguishing employment readiness from enterprise readiness is vital. Among working youth who are not self-employed (casual, wage and unpaid family workers, n=616), 67% of female youth and 66% of male youth reported having the necessary skills to start their own business, with an additional 18% of females and 19% of males feeling partially equipped, and only 15% reporting they lacked skills entirely. However, true enterprise readiness requires looking beyond perceived skills to structural constraints, and on these the survey is less reassuring: 73% of youth said a market exists for what they would produce, but only 44% of those asked said

³⁹ World Bank, [Sudan Economic Update 2025: The Economic and Social Consequences of the Conflict](#) (Washington DC, 2025).

business development services are available to them and 26% had ever used them, 57% of all youth use no financial service of any kind, and 93% of those already in business name lack of capital as their main challenge. Enterprise readiness is therefore high on perceived skills and market presence and weak on finance and support services, which is where a self-employment pathway would have to invest.

Most of the non-working youth have never worked before (58%), with a wide gendered divide indicating a higher proportion of female youth (70%) never having entered any form of employment (compared to 33% of male youth). This suggests that female youth who are currently out of employment are more likely to be first-time labour market entrants, while unemployed male youth are more likely to have previous work experience and may be between jobs or employment activities. This pattern is consistent with the broader deterioration in Sudan's labour market following the conflict. The World Bank attributes the sharp increase in national unemployment to widespread business closures, economic uncertainty and a substantial decline in stable job opportunities, all of which have reduced opportunities for both labour market entry and continued employment.

The primary reason reported across the nine assessed states for not working is being in education or training (24%), followed by not finding suitable work (17%), household responsibilities (13%) and illness, injury or pregnancy (12%). A marked gendered gap is reported under household responsibilities, reported by 17% of women compared to 4% of men, roughly four times higher for women, while men more frequently reported being in education (27% against 23%) and health limitations (16% against 10%). These findings highlight the interaction between supply-side barriers, including education, skills and household responsibilities, and limited employment opportunities. The broader economic environment has further intensified these challenges, with the World Bank reporting a sharp deterioration in economic activity and a significant reduction in stable employment opportunities following the outbreak of the conflict.

Regarding job search, 61% of non-working youth said they were currently looking for work (59% of women, 66% of men) and 51% had tried to find work or an income-generating activity in the past (45% and 63%). Using the ILO convention, the 39% who are neither working nor looking would be counted as outside the labour force rather than as unemployed; their main reasons for not looking were being in education (45%, and 55% of young men), health or disability limitations (20%, 30% of young men), household responsibilities (17%, 23% of young women), lack of capital (10%) and not being interested in working at the moment (10%). These findings are consistent with the gendered barriers related to household responsibilities highlighted above. Among those who had searched, trade was the sector most looked in (39%), followed by daily or casual labour in any sector (24%), manufacturing (9%), services (9%) and agriculture (8%), with only small gender differences (agriculture 10% of men and 6% of women; services 10% of women and 8% of men). The main barriers they met were the lack of job opportunities (60%) and lack of capital or resources (49%), well ahead of lack of skills (19%) and lack of experience (17%). Capital is therefore a constraint for non-working youth too, not only for those already in business: 63% of non-working youth named lack of capital among their top three challenges to getting a job or improving income, compared with 81% of working youth. Youth reportedly rely on informal networks in their job search with more than half (57%) requesting support from friends and family. Nearly one-third (32%) actively approached employers and markets, while 18% applied for open vacancies.

1.5.1. Future employment aspirations

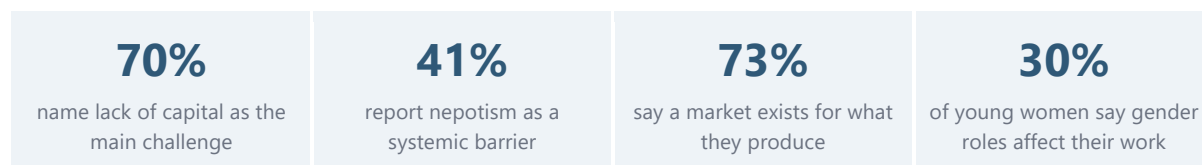
The assessment captures perceptions from youth on what they consider the most suitable types of business or employment, and what they believe currently offers the most opportunity. Regarding suitability⁴⁰ of business/employment, findings reflect strong gendered similarities, with petty trade emerging as the

⁴⁰ Suitability with regard to youth perceptions refers to self-reported access to income-generating activities, matching their skill levels and local opportunities. Since reporting was on a wide range of multiple income-generating activities, there has not been a categorisation into the main sectors.

predominant preference for both female (64%) and male youth (65%), followed by crop farming as a secondary choice (32% female, 38% male). However, some economic activities beneath these primary economic activities exhibit marked gendered deviations, most notably in tailoring, which was more often seen as suitable by female youth (12%) than male youth (3%). On the other hand, construction (12% female, 16% male) and repair/technical works (7% female, 11% male) were more often seen as suitable by male youth. In terms of employment modality, 77% of youth reported a preference for self-employment, compared with 15% who reported a preference for wage employment (73% and 17% among non-working youth, 83% and 12% among those working). These are perceptions of what is suitable and accessible, not the criteria used to prioritise sectors: the pathway analysis in the section on sectoral viable pathways combines youth preferences with employer demand and working-condition indicators (Annex I) precisely so that a popular, low-entry activity such as petty trade is not prioritised on preference alone.

Asked which sector has the most potential for youth self-employment in their area, self-employed youth (n=540) closely mirror the suitability findings, led by trade and small business (65% female, 60% male), followed by agriculture (20% female, 26% male), manufacturing (12% female, 8% male), and services (3% female, 7% male), with aggregate sector-level rankings showing minimal variance between genders. **These findings indicate that trade and agriculture are perceived as the most suitable sectors across both genders, suggesting that these sectors are viewed as relatively accessible entry points into income-generating activities despite differences in labour market experience and constraints.** This convergence highlights the importance of interventions that expand opportunities in these sectors while addressing gender-specific barriers to participation. The apparent contradiction with the deep dive, where 74% to 79% of young crop farmers want to leave farming, is one of perspective: youth rate crop farming as an accessible entry point for young people in general (37% named agriculture as one of the easiest sectors to enter with limited capital or experience), while those already in it describe low, seasonal income and want to move, mostly into trade.

2. Opportunities, aspirations and constraints: youth perspectives



2.1. Main barriers to employment and income-generating activities

Lack of capital is predominantly identified as the main challenge preventing youth from getting a job or improving their income across the study areas (70%) and its significance is more likely to be reported by working youth (81%) than non-working youth (63%). Capital access is therefore less an entry barrier than a growth ceiling with youth who are employed reporting this to be an acute barrier to future scalability and growth potential. Lack of job opportunities is the second most reported constraint (30%), with a marginal difference across employment status. Household responsibilities are cited as a top-three barrier by 13% of youth overall, and the pattern is clearer once gender and employment status are combined: 18% of working women and 14% of non-working women cite them, against 16% of working men and 5% of non-working men. Working women are also the group most likely to carry regular care responsibilities (71%) and to say these reduce their working hours (47%), prevent them from attending training (34%) or limit travel (30%). The survey did not ask what the responsibilities consist of, but it did ask how they affect work, and the more plausible reading is that for a share of women household responsibilities prevent entry altogether, so they appear among the non-working as a reason for not working (17% of non-working women, four times the male rate) rather than as a job-search barrier, while for women who do work they act as a ceiling on hours, training and

mobility. Young women in Um Dukhun put it simply: “women face constraints on access to work because some work depends on sex, as do household duties, together with a lack of experience.”

2.2. Institutional and systemic issues limiting employment or business access

Nepotism and favouritism were reported as the predominant systemic barriers (41%), more likely to be reported by youth employed (48%) than youth out of employment (36%). Weak government support comes in second with 32% of youth reporting this as a systemic issue, while social norms were reported as a minor systemic barrier overall (9%). There is a consistent pattern across the top three reported systemic barriers/issues that youth in employment are more likely to identify them as barriers than those not employed. Taken together with the main reported barrier of capital access, it suggests that these systemic barriers are compounded sharply once youth are in the labour market, trying to navigate employment growth.

Focus group discussions give these percentages their texture. **Capital dominated every discussion:** a young man in Bahri, Khartoum, who had returned after displacement “found my shop looted and I need new capital to start again from zero”; women in Gadambalia, Gedaref, described “a major challenge in finding work opportunities, given the absence of connections and the absence of capital”; and in Tulus, South Darfur, girls explained that even marginal work such as making taamiya (falafel) “has also stopped because there is no capital”. Where finance exists it is feared as much as wanted: young men in Kassala “fear legal proceedings and police accountability if they cannot repay loans”, and delays in disbursement erode a loan’s value through inflation before equipment can be bought. **Nepotism was described as the way the labour market actually works rather than as an abuse of it:** “work has come to depend on personal connections” (young women, White Nile); “there is favouritism and bias in selecting workers, and displaced people in particular have few chances of being selected” (young men, New Halfa); and a government informant in Gedaref said that hiring “is built on interests and connections; there is no finance and no support unless you have contacts in the institutions”. **Social norms were raised mainly by and about young women:** mixed work and market work are “not allowed” for girls in Yathrib, Gedaref, and men in Kassala listed “cultural and social norms, limited safe transport, safety and security concerns [...] and family responsibilities” as the specific barriers women face, which is consistent with the 9% of youth overall but 30% of young women who see gender norms as a constraint.

2.3. Market availability and access

Across the study area, 73% of surveyed youth reported that markets or buyers exist in their area for what they produce or would like to produce, 14% said there were none and 13% did not know. Availability was highest in North Kordofan (89%), South Kordofan (83%) and Central Darfur (81%), around the average in Kassala (75%), South Darfur (73%) and Khartoum (71%), and lowest in White Nile (68%), Gedaref (64%, where 21% did not know) and River Nile (50%, where 31% did not know). Where markets exist, most youth can reach them (89% overall), with access highest in Gedaref and South Darfur (95% each), River Nile (94%), Khartoum (93%), North Kordofan (91%) and Kassala (90%), and lowest in White Nile (85%), South Kordofan (81%) and Central Darfur (80%); among the minority without access, transport cost (58%) and distance (51%) are the main barriers, and insecurity was added by almost half of those without access in Central Darfur (46%) and a third in South Kordofan (31%). All assessed localities are urban or peri-urban by design, so these differences are not a rural-urban effect. The high availability reported in the Kordofans is consistent with what youth in Er Rahad and Sheikan described: markets and buyers exist, and the constraint is reaching them (“the areas where work opportunities exist are expensive to reach, and most agricultural areas are in unsafe places”) rather than an absence of demand. Where youth said no market existed, the most common explanation was low demand (21%), with a further 19% unable to say why; in South Kordofan the absence of traders or buyers (54%) and conflict-related market disruption (49%) were the leading reasons.

Implications for programming. Youth's own ranking of barriers is consistent across states: capital first, jobs second, then skills. That ordering argues for sequencing support as finance or assets first (grants, in-kind stock or tools, savings groups), with skills and business training attached to them, rather than training first. The systemic barriers youth name, nepotism and weak government support, are things a programme can route around (transparent selection, employer engagement on open recruitment) rather than fix, and the market-access results say that in most states the problem is the cost and safety of reaching buyers, which points to transport, aggregation and market-infrastructure support rather than demand creation, while in Central Darfur and South Kordofan, where insecurity is named by 46% and 31% of those without access, active conflict makes market access a binding constraint for now.

3. Labour market demand and opportunities: employer perspectives

936 employers and MSMEs interviewed	37% recruited in the past 12 months	1.3 workers recruited per business in a year	44% find it difficult to recruit qualified youth
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The following section complements the aforementioned perspectives on labour supply with labour demand, presenting findings from interviews with 936 employers across the nine states. This section examines the businesses and institutions that create employment: their structure, performance, hiring practices and conditions under which they would engage with youth. **Employers were asked to classify themselves by type of actor (27% described themselves as MSMEs, 14% as small traders and 11% as medium traders)⁴¹ and by sector: services (35%), trade (30%), manufacturing (15%), agriculture (13%) and agro-processing (6%), with 1% in other sectors. Agro-processing (mills, oil presses and food processing, 91% of the 57 employers in that group) was sampled as a sector in its own right, and is described separately after the agriculture section.** This labour-demand picture should be interpreted against the broader economic disruption caused by the conflict. The World Bank estimated that Sudan's real GDP contracted by 29.4% in 2023 and a further 13.5% in 2024, reflecting severe disruptions to economic activity and productive capacity. In this context, employment constraints identified by employers, particularly weak business growth, limited finance and labour-market disruptions, reflect not only enterprise-level limitations but also the wider contraction of the economy. The businesses interviewed are also, by construction, the ones that survived that contraction (see limitations), so the employer figures are best read as an upper bound on what the private sector in these localities can offer.⁴²

3.1. Employer and business profile

The trade sector is largely retail- and market-stall-based, with retail trade (41%) and market stalls (24%) together accounting for nearly two-thirds of reported activities, followed by wholesale (23%) and mobile trading (10%). It also appears to be the least formalised sector among the actors assessed,⁴³ with small traders (41%) and medium traders (34%) constituting the majority, followed by informal vendors (13%) and informal traders (10%). The services sector reflects considerable heterogeneity in both activities and actor profiles, with

⁴¹ The figures provided in the narrative cover only the largest proportions; the remaining responses (accounting for 47% of the total) include daily labour contractors, employment agencies, government institutions, informal enterprises, informal operators, informal service providers, informal traders, informal vendors, livestock actors, NGO employment service providers, private employment service providers, public employment service providers, service providers, and smallholder farmers/producers.

⁴² World Bank, [Sudan Economic Update 2025: The Economic and Social Consequences of the Conflict](#) (Washington DC, 2025).

⁴³ Formality in this report is based on how employers described themselves when asked what type of actor they are (for example registered MSME, small or medium trader, informal vendor, informal trader, informal operator, informal service provider). The survey did not ask about licences or registration (given the sensitivity), so 'informal' means self-identified as informal rather than verified as unlicensed.

personal services (21%), transport (17%), repair (16%), and construction (15%) representing the largest activity categories. MSMEs constituted the largest group of service-sector respondents (26%), followed by informal operators (16%) and informal service providers (16%), while the sector also included a meaningful share of institutional actors, including NGO service providers (8%), public-sector actors (7%), and daily contractors (10%).

Manufacturing was the most MSME-dominated sector, with MSMEs accounting for 67% of respondents and informal enterprises 29%; by activity type, respondents were distributed across carpentry and metalwork (28%), food production (23%), tailoring and garments (17%) and a residual category the survey labelled 'micro-enterprises (crafts and repair)' (30%), which on the product question consists mainly of small manufacturing workshops (64%), repair and maintenance (17%) and personal services (17%).⁴⁴ Agriculture was dominated by smallholders (41%), followed by livestock actors (23%, employers who described themselves as livestock keepers or pastoralists), MSMEs (19%, almost all of them input-supply businesses selling seeds and tools) and service providers (14%), with crop production representing the largest activity category (42%), followed by input supply (29%) and livestock/pastoralism (28%). These findings indicate a clear gradient in the degree and nature of formality across sectors: manufacturing had the strongest representation of MSMEs, trade was predominantly characterised by small and medium traders and informal vendors, while agriculture was more strongly smallholder-based, with livestock and pastoral actors also accounting for a substantial share of respondents. The services sector displayed the greatest diversity of activities and actor types, spanning formal and informal businesses as well as institutional actors.

⁴⁴ WB, SME Finance Forum, & IFC, [Micro, Small and Medium Enterprises – Economic Indicators \(MSME-EI\) Analysis Note](#) (2019). "MSME" encompasses a broad spectrum of definitions, and these definitions are all largely quantitative in nature, varying considerably between economies and regions.



Figure 7: Primary sectors and economic activities of assessed employers



3.2. Labour demand and hiring dynamics

Across sectors, 37% of employers had recruited in the previous 12 months and 38% expected to hire in the next 12 months, with a further 26% unsure. Recent hiring was most common in agro-processing (47%) and services (46%), followed by agriculture (36%), manufacturing (33%) and trade (27%), and expected hiring follows the same order (services 42%, manufacturing 41%, agro-processing 40%, agriculture 38%, trade 32%). Among employers planning to hire, the roles expected are skilled technical roles in services and manufacturing (59% and 60% of those hiring) and casual labour in trade and agro-processing (60% and 70%). The interviewed employers reported 810 currently unfilled positions between them, 309 of them in services, although, because the employer sample is not representative, this cannot be scaled to a market-level estimate of vacancies. Youth already make up the majority of the workforce in a third of service businesses (32%) but in only 12% of manufacturing businesses, and wage employment through existing employers is a narrower channel than self-employment in every sector: asked which pathways are most realistic for youth in their area,

64% of employers named self-employment, 30% wage employment, 26% casual labour and 18% migration for work.

Taken together, the hiring figures give a first measure of how much employment the interviewed businesses can absorb. The 348 employers who recruited in the previous 12 months took on 1,222 workers between them, 3.5 each, or 1.3 per business across the whole sample; current vacancies amount to 0.9 per business and expected hires over the coming year to 1,749 positions, or 1.9 per business. Absorption differs sharply by sector: agriculture employers took on 2.1 workers per business over the year and services 1.6, against 1.1 in manufacturing and agro-processing and 0.6 in trade, the sector in which the largest share of working youth are found. In other words, **a typical surviving micro-business in these localities creates roughly one job a year, most of it casual, and the total expected hiring reported by 936 employers is smaller than the youth sample itself.** As with the vacancy figure, this cannot be scaled to a market estimate, but it does indicate that wage placement can be one component of the programme's strategy rather than its backbone, which is consistent with employers' own view that self-employment is the most realistic pathway for youth (64%).

3.2.1. Services

The service sector accounted for the largest share of assessed employers (35%) and shows relatively strong potential for continued employment creation. The sector has a relatively established business base, with 43% of service businesses having operated for six or more years, indicating that many were established before the onset of the war. It also has one of the highest shares of larger employers, with 19% employing 10 or more staff. In terms of business performance, 50% of service businesses described their operations as stable and a further 20% reported expansion, suggesting that most businesses surveyed were either maintaining or growing their operations rather than contracting.

The sector also shows comparatively strong recent recruitment activity and a notable concentration of young workers. Nearly half of service-sector employers (46%) had recruited workers during the previous 12 months, compared with 37% across the study area. Youth are particularly prominent in the sector: 32% of employers reported that young people account for more than half of their workforce. However, employment opportunities remain highly unequal by gender. More than two-thirds of service-sector employers (68%) reported employing no women. At the same time, 9% reported that women account for more than half of their workforce, the highest share among the sectors assessed. Thus, while services provide relatively strong opportunities for youth employment, access to these opportunities remains heavily concentrated among men, with only a small proportion of businesses demonstrating more balanced or women-dominated workforces.

Recruitment patterns point to a significant skills constraint. Technical and skilled workers were identified as a recruitment need by 55% of service-sector employers, followed by casual labour (42%) and semi-skilled workers (31%); these categories are not mutually exclusive. Technical occupations were also the most difficult positions to fill, cited by 27% of employers, followed by management roles (13%) and digital positions (12%). **This suggests that the main constraint to further expansion is not simply the availability of labour, but access to workers with the specific technical and occupational skills required by service businesses.**

These findings suggest that the services sector combines a relatively established business base, comparatively high recent recruitment, a strong presence of young workers, and reported business stability or expansion. At the same time, the sector faces a clear shortage of technical and skilled workers and reported gender gaps in employment. The findings also further reveal that services could provide a significant pathway for youth employment, particularly where skills development is closely aligned with employers' technical and occupational requirements, while targeted measures may be needed to increase women's participation.

Employers were also asked directly about hiring young women. Across all sectors, half (50%) said they are not open to hiring young women, 22% would hire them if qualified, 10% are open but rarely do so and only 12% actively hire them; in services the shares are 52% not open and 14% actively hiring, in trade 50% and 9%, in manufacturing 49% and 18% and in agriculture 40% and 12%. Asked about the social and cultural barriers in

their sector, 42% of employers named restrictions on women's work or mobility and 27% care responsibilities, while 35% saw no barrier. Where employers identified young women as the group facing the greatest barriers in their business (28% of employers), they attributed this to social or cultural norms (50%), lack of relevant skills (39%), limited work experience (22%) and caregiving responsibilities (17%); outright employer bias was acknowledged by 12%. The things employers most often said would make it easier to employ women, displaced youth or persons with disabilities were skills training (59%), workplace adaptations (39%), wage subsidies (29%) and flexible schedules (25%). A training-centre director in Gedaref described the same ceiling from the other side: women "work in the market, at home and in the neighbourhood" selling food, soap and tea, while "girls face more difficulty in getting hired than any other group, even with the experience and crafts they have".

Openness to the other two priority groups differs sharply. Persons with disabilities face the same closed door as young women: 88% of employers have none in their workforce, 47% are not open to hiring them, 27% would if qualified, 14% are open but rarely hire and 6% actively do; 16% of employers acknowledge stigma towards persons with disabilities as a barrier in their sector and 23% cite disability-related barriers when explaining why some groups are not hired. **Internally displaced youth are treated differently: 56% of businesses employ none, but only 13% say they are not open to hiring them, 55% would hire them if qualified and 18% actively do.** For displaced youth, then, the constraint lies in lost capital, documents and networks rather than in employer refusal (section 3), while for young women and persons with disabilities it is a norm that a programme can work around, or select employers on, but cannot remove.

3.2.2. Trade

Trade is the second-largest sector among the employers surveyed, with retail trade accounting for 41% of businesses and market stalls a further 24%. The sector has the least formalised business profile among the four main sectors, with small traders (41%) and medium traders (34%) together accounting for three-quarters of respondents. It is also characterised by relatively shorter business tenure: only 32% of trade businesses had been operating for six or more years. In terms of business performance, 53% of employers reported that their businesses were stable, while 24% reported declining performance, indicating that although most businesses had maintained their operations, relatively few (20%) reported growth.

Recent recruitment activity was also limited. Trade had the lowest reported level of new hiring among the sectors assessed, and only 22% of employers reported that young people constituted more than half of their workforce. Gender inclusion was particularly limited: 82% of trade employers reported employing no women, while only 3% reported that women constituted more than half of their workforce, the lowest share across the sectors assessed. These findings suggest that, despite trade being widely accessible as an entry point for economic activity, employment opportunities within established trade businesses are not translating into substantial opportunities for either youth or women.

Skill requirements in trade were also comparatively limited. Casual labourers (45%) and sales workers (37%) were the most commonly identified staffing needs, followed by skilled and technical workers (33%). At the same time, 25% of employers reported no difficulty filling positions, suggesting that recruitment constraints are less pronounced than in sectors requiring more specialised skills. **The employers' responses suggest that trade combines relatively low barriers to entry with limited business growth and low levels of new hiring.** This is particularly significant given that trade is the most preferred livelihood pathway among youth in the assessment: while the sector may offer an accessible route into self-employment and income generation, the findings suggest more limited potential for expanding wage employment within existing businesses, as only 6% of employers in the sector reported employing 10 or more employees. Whether these are full-time or seasonal positions was not asked directly; payment arrangements point to continuous but daily-paid work (58% of trade employers pay daily wages, 26% a monthly salary), and only 12% said working hours vary by season or task, about the same as in agriculture (11%).

3.2.3. Manufacturing

Manufacturing has the strongest representation of MSMEs among the sectors assessed, with 67% of employers identifying as MSMEs. The sector's activities are concentrated in carpentry (28%), food production (23%; the manufacturing of food products, distinct from the agro-processing businesses sampled separately), and tailoring (17%). Nearly half of manufacturing businesses (47%) had been operating for six or more years, indicating a relatively established business base. Business performance was predominantly stable, with 52% of employers reporting stable operations, while 27% reported declining performance. **Despite its relatively formal business structure, manufacturing businesses were generally small in terms of workforce size, with 93% employing fewer than 10 workers.** Recruitment activity was also moderate, with approximately one-third of employers reporting that they had recruited workers during the previous 12 months. Youth representation was particularly low: only 12% of manufacturing employers reported that young people constituted more than half of their workforce, the lowest share across the four sectors. Women's participation was similarly limited, with two-thirds (67%) of employers reporting that they employed no women.

Manufacturing nevertheless shows strong demand for specialised skills. Skilled and technical workers were identified as a staffing need by 57% of employers, the highest level across the four sectors, and skilled trades were the most difficult roles to fill⁴⁵, cited by 26% of employers. **This combination of high demand for technical skills and difficulty filling technical positions points to a potential skills constraint on the sector's ability to expand.** This implies that manufacturing has a relatively established and MSME-oriented business base, but most enterprises remain small, recruitment levels are modest, and both youth and women's participation are limited. Similarly, the pronounced demand for technical skills suggests that improving access to market-relevant technical and vocational skills could help address a key constraint to employment and business growth in the sector.

3.2.4. Agriculture

In Sudan, agriculture remains a crucial sector in the economy by contributing approximately 35% of the GDP and accommodating 40–45% of the workforce.⁴⁶ However, agricultural activities have been constrained by multiple factors since the outbreak of the conflict, including insecurity, climate shocks, displacement, limited access to inputs and finance, as well as rising labour costs.⁴⁷ Despite these constraints, the sector remains relatively well established by tenure, with over half (59%) of businesses being operational for six years or more. In terms of economic activities, the sector is split between crop production (42%), input supply (29%) and livestock/pastoralism (28%) and dominated primarily by smallholders (41%) and livestock actors (23%). Business performance indicates general stability with 51% reporting a stable business. The sector also has one of the largest shares of mid- to large-size employers, with 19% reporting 10 or more employees. Consistent with these findings, World Bank⁴⁸ and UNDP⁴⁹ analyses both point to agriculture as a pivotal vehicle for broader economic recovery. Beyond direct farming, resolving key production and infrastructure bottlenecks can unlock substantial labour demand across off-farm value chain nodes, including processing, transport, input supply, and marketing.

Agriculture recruited new workers at a moderate rate with a third reporting hiring in the last 12 months. The largest need for casual labour is highlighted in this sector (60%), alongside a moderate need for skilled/technical workers (45%). Additionally, workforce composition of youth is moderate (21% youth

⁴⁵ In this report, "skilled trades" refers to occupations requiring a recognised craft skill normally acquired through vocational training or apprenticeship (electrical work, welding and metalwork, carpentry, plumbing, refrigeration and air-conditioning, mechanics, tailoring); "technical positions" covers roles requiring a formal technical qualification (engineering, ICT, accounting). Both follow the categories of the employer questionnaire.

⁴⁶ World Bank, [Sudan Economic Update 2025: The Economic and Social Consequences of the Conflict](#) (Washington DC, 2025).

⁴⁷ FEWS NET, [Sudan Food Security Outlook](#) (2026).

⁴⁸ World Bank, [Sudan Economic Update 2025: The Economic and Social Consequences of the Conflict](#) (Washington DC, 2025).

⁴⁹ UNDP, [Restoring Trade and Livelihoods: Sudan's Agri-food and Market Resilience Analysis](#) (SAMRA) (2026).

majority). In terms of gender, over half (55%) reported no women employed, which, while a majority, represents the lowest proportion of zero-female across all sectors. **This means women are more likely to be present in the agricultural workforce than in services, trade or manufacturing, although still a minority in most businesses.** Technical roles were the single most challenging occupation to fill (27%); the technical skills agricultural employers most often found lacking among young applicants were vocational skills (48%), agricultural skills (40%), machinery and equipment operation (30%) and repair and maintenance (23%), and key informants named tractor and pump operation and repair, irrigation and agricultural extension as the specific competences in short supply. **Given the livelihood activities of the assessed states, the relatively small share of youth employment in agriculture may be linked to displacement, the engagement of young people in non-agricultural unskilled activities, and insecurity-related constraints on access to agricultural fields.** These factors also have direct implications for agricultural productivity and contribute to lower interest among producers in further investment in the sector.⁵⁰

The broader production context reinforces this concern. The World Bank reported that cereal production in conflict-affected areas (particularly Kordofan and Darfur) fell to an estimated 80% below average in 2023, while livestock production was also disrupted. It also highlights poor road networks, limited transport and storage, conflict-related disruption of trade routes, limited agricultural finance, and recurrent climate shocks as major constraints on the movement and commercialisation of agricultural output. These constraints help explain why agriculture can remain an important source of livelihoods while generating relatively limited and unstable employment opportunities.

Agro-processing, sampled separately (n=57; mills, oil presses and food processing), sits between agriculture and manufacturing in its profile and is where the off-farm opportunity is most visible in the employer data. With 57 employers, the shares below are indicative. It had the **highest recent recruitment of any sector** (47% hired in the previous 12 months) and 40% expected to hire again, overwhelmingly casual labour (70% of those hiring) but also skilled technical (39%) and administrative roles (39%). **Its businesses are almost all self-described MSMEs (91%) with fewer than 10 workers (84%), 47% have operated for more than six years, 46% described their business as stable and 23% as growing, and 25% have a youth-majority workforce.** Women are scarce here (72% employ none, second only to trade at 82%), pay is comparatively good (39% report typical skilled daily wages above SDG 20,000, second only to services) but hours are long (40% report more than 8 hours a day) and 54% report finding qualified youth difficult. Employers in this group most often lacked machine operation skills among applicants (46%), and 54% were willing to join youth employment programmes. Focus group participants and key informants in Gedaref, River Nile and White Nile named oil pressing (groundnut and sesame), milling, bread and snack production and soap-making as the processing activities with demand, and the validation workshop with EMPOWER field teams leaned towards treating agriculture in Kassala, River Nile and Gedaref as a value-chain pathway (inputs, logistics, processing) rather than direct crop farming.

3.3. Terms of employment: wages, hours and safety

As described by the World Bank, the national employment landscape in Sudan is defined by a severe structural shift: full-time wage employment has collapsed from 33% before the conflict to just 16%. Widespread business closures, capital flight, infrastructure destruction, and supply chain disruptions have eliminated stable job opportunities, pushing a significant majority of the population into informal or precarious work.⁵¹ Against this backdrop of widespread informality, working conditions and job quality vary considerably across economic sectors. Among the surviving formal and semi-formal sectors, services emerges as the strongest performer overall, engaging the highest share of workers with adequate working hours (43%) and adequate wages for

⁵⁰ IFPRI, [Farming in crisis: Livelihood challenges and resilience in conflict-affected Sudan](#) (2026).

⁵¹ World Bank, [Sudan Economic Update 2025: The Economic and Social Consequences of the Conflict](#) (Washington DC, 2025).

skilled labour (43%)⁵², as reported by the employer survey. Conversely, manufacturing offers the weakest remuneration, with only 25% of skilled workers receiving adequate daily pay. trade demonstrates the best workplace safety record (55% report no safety risks), though it presents the highest prevalence of overworking (44% working over 8 hours daily).

Table 2: Working conditions and payment arrangements, according to employers

	Agriculture	Manufacturing	Services	Trade
Working hours				
Adequate working hours [7–8 hours a day]	40%	36%	43%	30%
Overworking [>8 hours a day]	22%	29%	36%	44%
Daily wages				
Adequate daily wage skilled labour [>SDG 20,000/day]	30%	25%	43%	26%
Adequate daily wage semi-skilled [>SDG 20,000/day]	14%	17%	22%	17%
No safety risks at the workplace ⁵³	31%	36%	42%	55%

Collectively, these findings demonstrate that **high hiring demand within a sector does not automatically translate into decent working conditions**. As formal wage employment continues to contract, youth employment programming must look beyond mere job placement to consider sector-specific trade-offs between hours, safety, and wage adequacy.

Payment arrangements explain much of the instability that young people report. Across sectors, 45% of employers pay by the day, 13% by piece or task and 8% weekly, against 17% who pay a monthly salary; daily payment is most common in agro-processing (60%), manufacturing (51%) and trade (48%). On the youth side, only 28% of working youth describe their income as stable, while 47% call it irregular and 22% seasonal. The two figures describe the same arrangement from both ends: **the modality of payment, rather than the sector, is what makes most youth work fall short of a stable income**, and it is a term that a placement or apprenticeship agreement can fix directly.

3.4. Skills demand and skills gaps

Employers reported clear differences in skill requirements across sectors, reflecting the distinct nature of work and occupational profiles within each sector. **Across the nine states, skilled technical workers were the most frequently identified staffing need, cited by 46% of employers, followed by field workers (36%) and sales staff (28%). These needs vary substantially by sector:** manufacturing reported the strongest demand for skilled technicians (66%), agriculture was predominantly seeking field workers (64%), while trade had the highest demand for sales staff (49%). This sectoral differentiation indicates that skills interventions are likely to be most effective when aligned with specific occupational requirements rather than delivered through a uniform training approach. Figure 5 and section 1.4 give the youth side of the same comparison; the 32% full-

⁵² Adequacy thresholds used in Table 2: 7 to 8 hours a day for working hours, and a typical daily wage above SDG 20,000 (approximately USD 4.6 at the time of data collection), the top band offered in the employer survey. Employers reported typical daily wage bands for skilled and semi-skilled workers in their business or sector, not actual pay records.

⁵³ In this assessment, safety risks are self-reported (by employers in Table 2 and by youth in section 1.4) and encompass physical hazards, environmental or security threats linked to ongoing local instability, and a lack of basic labour protections or secure physical premises. In the employer survey, respondents selected up to three main safety risks for workers in their business from: physical injury; exposure to chemicals, dust or smoke; unsafe equipment or tools; long working hours or fatigue; harassment or abuse; movement or security risks; or no major safety risk. The most reported risks were physical injury (agriculture 37%, manufacturing 36%, services 34%) and long hours or fatigue (30% to 31% in every sector except agro-processing).

match figure quoted below is for all youth, working or not; among working youth it is 42%, ranging from 37% among petty traders to 47% among youth in services.

Employers also reported significant challenges in accessing suitably qualified young workers. Overall, 44% indicated that finding qualified youth workers was difficult or very difficult, pointing to a substantial skills-matching constraint between young jobseekers and available employment opportunities. **This is broadly consistent with young people's own perceptions:** only 32% of youth reported that their skills fully matched available job opportunities, while 42% perceived a partial match and 26% reported no match. The findings therefore point to a clear gap between the skills young people possess and the requirements of available employment opportunities, although the extent of this gap varies across sectors and occupations. Additionally, employers' ability to recruit is constrained not only by the availability of appropriately skilled workers but also by their capacity to create additional jobs. Lack of finance was the most frequently reported barrier to hiring more workers, cited by 61% of employers, followed by insufficient business growth or demand (43%) and high labour costs (33%). These findings indicate that youth employment constraints exist on both sides of the labour market: employers face difficulties finding suitably skilled workers, while young people report limited alignment between their skills and available opportunities; simultaneously, limited access to finance, weak business demand, and high labour costs restrict employers' capacity to expand their workforce. This suggests that improving youth employment outcomes will require a combination of demand-led skills development and measures that strengthen enterprise growth and employers' capacity to generate new jobs.

'Skilled technical workers' means different occupations in each sector. Employers were asked which roles the skills they look for are needed in and which technical skills young applicants most lack. In services the roles are skilled technicians and tradespeople (electricians, mechanics, refrigeration and air-conditioning technicians, plumbers) (53%), production workers (29%), drivers (18%), administrative staff (18%) and sales staff (18%), and the missing skills are vocational and technical (56%), machinery and equipment operation (32%) and repair and maintenance (31%); training providers and employers interviewed in Kassala, New Halfa, El Obeid, Gedaref and Atbara named general and automotive electricians, mechanics, refrigeration and air-conditioning technicians, phone and computer repairers, solar-system installers and plumbers as the trades in demand, with ICT, accounting and English for the office and NGO segment. In manufacturing the roles are skilled technicians (66%), production workers (43%), machine operators (17%) and sales staff (17%), with vocational skills (62%), machinery operation (34%) and repair skills (33%) most lacking; carpentry, metalwork, welding, blacksmithing, lathe work and tailoring were the trades named. In trade the roles are sales and customer service (49%), skilled technicians (31%) and production workers (26%), and the gaps are vocational (45%), financial and accounting (35%) and digital (29%). In agriculture the roles are field and production workers (64%), skilled technicians (36%) and sales (21%), with vocational (48%) and agricultural skills (40%) and machinery operation (30%) lacking, and agro-processing employers add machine operation (46%). Across all sectors the soft skills employers most often found lacking were discipline and work ethic (48%), communication (37%) and time management (30%), and what they look for first when hiring youth is work experience (63%) and reliability (49%), ahead of technical skills (43%). Employers' training priorities follow the same logic: technical and vocational skills (63%), apprenticeships and on-the-job learning (43%), entrepreneurship (30%) and digital skills (30%). Youth's own priorities align: asked which skills they would most like to acquire, they named technical and vocational skills most often (54%), followed by business skills (34%), ICT (33%), financial literacy (26%) and languages (24%).

Table: Roles employers hire for and the technical skills young applicants most lack, by sector (employer survey; share of employers in each sector)

Sector	Roles employers hire for	Technical skills applicants most lack
Services	Skilled technicians and tradespeople 53%, production workers 29%, drivers 18%, administrative staff 18%, sales staff 18%	Vocational and technical 56%, machinery and equipment operation 32%, repair and maintenance 31%
Manufacturing	Skilled technicians 66%, production workers 43%, machine operators 17%, sales staff 17%	Vocational 62%, machinery operation 34%, repair 33%

Trade	Sales and customer service 49%, skilled technicians 31%, production workers 26%	Vocational 45%, financial and accounting 35%, digital 29%
Agriculture	Field and production workers 64%, skilled technicians 36%, sales 21%	Vocational 48%, agricultural skills 40%, machinery operation 30% (agro-processing: machine operation 46%)

Whether these skills can be obtained locally is a separate question. **Only 27% of youth said a TVET or vocational training centre is available in their locality** (from 7% in Gedaref and 15% in South Darfur to 60% in White Nile), and 20% had received any vocational training in the previous 18 months, most often an apprenticeship (44%) provided by an NGO (35%) or a private institution (28%); 36% of those trained said it had no effect on their livelihood, while 19% got a job and 15% started a business. The barriers youth named were cost (48%), distance (37%) and lack of information (31%). Key informants from training providers confirmed the picture. Centres in Kassala, New Halfa, Gedaref, El Obeid and Atbara do offer general and automotive electrics, mechanics, refrigeration and air-conditioning, welding, solar installation and phone repair, and women's programmes in food processing, tailoring, henna and make-up, and several were described as effective. But providers listed shortages of raw materials and training inputs (in New Halfa practical work is 70% of the course, yet inputs for newer modules such as solar systems are scarce), too few qualified trainers, outdated curricula, certificates that "guarantee attendance but do not guarantee mastery" (Atbara), no accommodation for rural trainees, and fees that low-income youth and women cannot afford; entrepreneurship and digital training were described as weak or absent (New Halfa, Kassala), and none of the providers interviewed reported adapted equipment for trainees with disabilities. In Central Darfur and South Darfur informants and young people alike said there are no functioning vocational centres at all. Employers' preferred remedy, apprenticeship and on-the-job training, was also what providers asked for through partnerships with the private sector, and 55% of employers said job fairs or matching events would help them find suitable young workers.

Implications for programming. The demand side does not describe a general skills shortage but a set of specific trades per sector, most of them teachable in months, which is what a demand-led TVET offer should be built around: electrical, mechanical and refrigeration trades and phone repair for services and manufacturing, machine operation for agro-processing, sales and bookkeeping for trade. What employers want first, however, is experience and reliability, and what they are readiest to host is on-the-job learning with a programme-paid stipend for the trainee (stipend or wage support is the help employers most often ask for, 59%), so apprenticeships with wage support are the natural bridge, especially where the local TVET centre is weak or absent. Where centres exist, supporting inputs, trainers and certification will do more than building new capacity.

Table 3: Employment-skills gaps and availability of in-demand skills, as reported by employer survey

	Agriculture	Manufacturing	Services	Trade
Skill demand				
Skilled technicians	36%	66%	53%	31%
Field workers	64%	43%	29%	26%
Sales workers	21%	17%	18%	49%
Ease of finding qualified youth				
Difficult + very difficult	41%	54%	42%	42%
Easy + very easy	59%	46%	58%	58%
Top 3 hiring constraints				
Lack of finance	67%	62%	54%	66%
Lack of business growth	40%	46%	41%	47%
High labour costs	38%	33%	29%	33%

4. The enabling environment

57% of youth use no financial service	61% of employers: finance limits new vacancies	58% of employers would join a youth programme	13 priority or promising state-sector pathways
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The enabling environment encompasses a broad range of market, financial, regulatory and private-sector conditions within which employers and youth operate. These conditions shape the viability of sector-level opportunities and labour demand identified in the section on viable employment pathways. In Sudan's context of protracted conflict and fragmented actor control, this environment has been substantially disrupted. Financial institutions and services have contracted sharply, transaction costs and market access have been affected by insecurity and fragmented territorial control, and the regulatory and taxation environment has become a major challenge for businesses attempting to operate or grow. At the same time, the private sector continues to demonstrate a degree of resilience suggesting the potential to engage with market actors. This section highlights the enabling environment across three dimensions of market access and finance, the policy and regulatory environment and private sector engagement.

4.1. Market access and finance

Constraints to business growth follow a similar pattern to hiring constraints: 74% of employers report the lack of finance as a constraint to growth, with marked differences across sectors (68% service sector, 81% agriculture). Weak market demand (34%) and inflation (30%) are fairly uniform across sectors, suggesting that while financing has specific sectoral differences, demand and price pressures are experienced broadly the same way regardless of sector. Taxes and fees (25%), transport costs (21%), insecurity (21%) and electricity or fuel shortages (21%) follow. The FEWS NET Food Security Outlook further described the impact of limited access to finance on agricultural productivity and employment opportunities, noting that the Agricultural Bank of Sudan (ABS) reportedly provided only 21% of its pre-conflict level of agricultural finance (2022) in 2025.⁵⁴

The enabling environment is not uniform across states, even if finance dominates everywhere. Lack of finance as a constraint to growth ranges from 60% of employers in Kassala and 63% in Gedaref to 86% in South Darfur and 87% in South Kordofan. Insecurity is a growth constraint for around half of employers in South Kordofan (54%), Central Darfur (52%) and White Nile (52%) but for fewer than one in ten in Khartoum, River Nile, Gedaref and Kassala. Taxes and fees weigh most in White Nile (51% as a growth constraint, and 82% name them as the main policy barrier) and Khartoum (75% as a policy barrier), while North Kordofan has the largest share of employers reporting no policy barrier at all (45%). Access to services is best in Kassala, Gedaref and White Nile, where over half of employers report access to financial services (62%, 59% and 55%) and a similar share to market information, and worst in South Darfur, where 64% have access to none of the listed services and only 14% to finance, and Khartoum (54% none). Electricity and fuel shortages are a growth constraint for around a quarter to a third of employers in Khartoum (31%), North Kordofan (28%) and River Nile (27%), and for 36% of manufacturers across states. The state annexes carry the full breakdown.

Access to enabling services is limited across the board, with minimal variances across sectors. Over a third of employers reported access to financial services (37%), with a close 36% reporting access to market information, while just 11% reporting adequate access to business development services. Job-matching services are almost absent: 5% of employers and 3% of youth report access to them. These constraints are particularly pronounced in the agricultural sector, where limited access to veterinary and marketing services affects pastoralist and agro-pastoralist areas. Besides, limited transport, irrigation pumps and other basic

⁵⁴ FEWS NET, [Sudan Food Security Outlook](#) (2026).

services constrained agricultural activities, including farming and the movement of produce. The conflict has further reduced market accessibility by increasing transaction costs by an estimated 30–40% and contributing to a reported 45% decline in formal cross-border trade. Low market readiness and competitiveness, together with limited producer capacity, may have further constrained enterprise growth and the expansion of employment opportunities, potentially contributing to the limited availability of employment opportunities observed among youth in this assessment. The UNDP's Sudan Agri-food and Market Resilience Analysis (SAMRA) further identified limited access to market information and limited awareness of buyer requirements among producers as important constraints to market participation and competitiveness.⁵⁵ Despite these constraints, supplier relationships appear relatively resilient. Most employers reported predominantly stable supply pipelines (61%), with a further 18% indicating an improvement in main supplies, suggesting supplier relationships are resilient even where financing and service access are weak (the employer survey covers businesses that were operating in urban and peri-urban localities at the time of data collection).

Findings from the UNDP Private Sector Engagement Strategy complement these findings.⁵⁶ On infrastructure, MSMEs reported a widespread collapse of electricity, water, telecommunications and transport networks, with power outages lasting up to 12 hours at a time forcing enterprises to rely on generators. The UNDP report does not give the frequency of outages; in this assessment electricity and fuel shortages were named as a constraint to growth by 21% of employers overall and 36% of manufacturers, and running on generators means higher operating costs, idle machinery when fuel is short and, for small workshops, a direct squeeze on the margin that would otherwise pay for an additional worker. On financial access specifically, the report identifies constraints including the collapse of the banking systems with interest rates on credit reaching up to 30% with collateral requirements that are difficult to meet considering the conflict-related loss of assets. At the national level, by contrast, UNDP identifies input supply disruptions as a primary constraint, driven by insecurity along transport corridors, rising checkpoint fees and fuel shortages, consistent with the estimated 30–40% increase in transaction costs.

The assessment's own key informant interviews with financial service providers and government institutions confirm and localise these constraints. Providers in Gedaref described a system in which microfinance and bank accounts are the main formal services but most people rely on savings groups, advances and borrowing from traders, and where "limited access to finance, high collateral requirements, weak financial literacy and the effect of inflation" exclude youth, with women and persons with disabilities facing greater barriers still. In New Halfa the vocational centre director observed that "current policies lack concessional finance windows and government guarantees, and financial institutions set complex conditions"; in Central Darfur providers said formal financial services are "simply not present" and that the only guarantee available to youth is "family and social relationships"; and in Kassala the open windows named were the Zakat Chamber, the graduates' employment scheme and agricultural cooperatives, with the caveat that youth cannot meet collateral requirements and that no products are designed for them. Youth themselves said loans are feared as much as wanted: in Kassala "some young people fear legal proceedings and police accountability if they cannot repay", in Khartoum "if a project does not pay off quickly, a person finds himself drowning in debt", and in White Nile girls said some avoid banks "for fear of being unable to repay, and because the market is unstable". This is consistent with the survey: 57% of youth use no financial service, and banks (20% of all youth) and microfinance institutions (8%) are used far more than savings groups (5%), the instrument youth in several focus groups described as the one that actually works for women.

Skills, business development and job-matching services: what providers say

Training providers describe a system that was small before the war and has since lost capacity. Government centres in the eastern states still run courses in electricity, auto-electrics, refrigeration and air-conditioning, phone repair and, recently, solar maintenance, with practical content of around 70%, but report

⁵⁵ UNDP, [Restoring Trade and Livelihoods: Sudan's Agri-food and Market Resilience Analysis](#) (SAMRA) (2026).

⁵⁶ UNDP, [Sudan Private Sector Engagement Strategy](#) 2026–2028 (April 2026).

shortages of raw materials “especially for the modern systems such as solar energy”, no boarding for trainees from rural areas, and a need for new trainers in computing, solar and refrigeration. In Khartoum an employer described the public centres as having “outdated curricula and ruined classrooms, training equipment and workshops”; in North Kordofan a business support provider said the only centre that trained adolescents “has been turned into a military site”; and in South Darfur and Central Darfur informants reported no vocational centre in the locality at all. Certification is the recurring weakness: a former training-centre director in River Nile noted that certificates “guarantee the trainee attended but do not guarantee that they were trained and mastered the specific skill”, and providers in Gedaref asked for stronger accreditation and follow-up after training. The youth data are consistent with this: 20% of youth have ever received vocational training, 44% of them through an apprenticeship, and 36% of those trained report no effect on their employment.

Business development service providers were the most reflective informants and their diagnosis is consistent across Kassala, Khartoum, River Nile and North Kordofan: services exist in the state capitals but are fragmented, short, poorly announced and unconnected to finance and markets. “The services exist but do not cover the large number of youth who need them; the project period is short and after the training ends there is not enough follow-up”; “sometimes the announcement reaches a specific group of people and the same individuals take part in more than one programme”; “market linkage is still missing because there is no link between production and marketing”. Two observations from Khartoum providers bear directly on the self-employment route that most youth will take. On saturation: “sometimes a young person gets funding and starts an activity because others are doing it, and after a while finds the market full of the same activity”. On cash management: “many small businesses do not separate business money from personal expenses”, so that the owner “discovers there is not enough capital to buy new stock”. What they said would help most is “individual mentoring for the business owner after they start”, which is “very scarce”. Among the 540 self-employed youth surveyed, 44% say business development services are accessible to them, 26% have used them and 84% think they would help.

No public employment service reaches young people. Labour offices in Kassala and River Nile register applicants for civil-service competitions, and an official in River Nile acknowledged that “a large share of youth do not have enough information about these services”, while a Kassala official confirmed there is “no integrated one-stop centre”. In practice the matching function is performed by family and friends (through whom 58% of working youth found their current activity), by WhatsApp and Facebook groups for those who are online and, in the Darfur localities, by humanitarian organisations and neighbourhood committees. A third of youth (33%) have no smartphone, internet or social-media access, 43% of young women against 21% of young men, and 69% of youth in Central Darfur, so a digital-only matching channel would miss the young people the programme most wants to reach. Employers recruit through the same networks (“big opportunities only come through relationships and acquaintances”, as a Khartoum employer put it) and 23% state a preference for known and trusted workers; 55% nonetheless said a job-matching service would help them and a further 25% that it might.

Implications for programming. The functions the programme can most cheaply add are the ones no one currently provides: post-start mentoring and a locality market map, delivered through the entrepreneurship centres and chambers that exist in Kassala, Gedaref, Khartoum and El Obeid; dual apprenticeships that pair a functioning centre (for theory and the trade test) with a master craftsman or business (for practice), with the programme covering materials, stipends and toolkits; and a light matching function run by a youth association, chamber or disabled persons’ union that posts vacancies online and through mosques, neighbourhood committees and youth centres. Where no centre exists, mobile trainers and master-craftsman placements are the only near-term option, and the AfDB and IOM programme rehabilitating vocational institutions in River Nile and White Nile is the public investment to coordinate with.

4.2. Policy and regulatory constraints

Employers' perceptions of the policy and regulatory environment are that taxation and fees (52%) are the primary barriers to their ability to operate, grow or hire, followed by licensing requirements (27%) and import-export restrictions (21%). Import and export limitations vary by sector, with most reported in the trade sector (29%) and agriculture (26%), the two sectors most reliant on cross-border and input supply flows. At the same time, nearly three in ten employers (29%) report no major policy barrier, which disaggregated by sector highlights the highest in the service sector (36%) and lowest in trade (21%). These findings are also consistent with FEWS NET's Food Security Outlook, which identified checkpoint taxation burdens, customs and foreign exchange controls, and export restrictions as critical regulatory factors hindering agricultural activities and employment in the sector.⁵⁷

Government and provider informants gave the regulatory picture a local face. In Gedaref and Kassala they pointed to fees and taxes that young business owners "are unable to pay", to licence fees that are "very high" even where licences are obtainable, and to public hiring that depends on connections rather than open competition; a Gedaref labour official noted that young people have left government jobs because "the salaries are lower and do not meet their needs", so that self-employment is now the main channel. Informants in Central Darfur described the absence of any government employment or training service, with youth organising neighbourhood committees, savings and clean-up initiatives themselves and NGOs the only actors offering training. The Zakat Chamber, the Ministry of Social Welfare and the graduates' employment scheme were the public bodies most often named as offering concessional finance or training, and in Kassala and Gedaref informants said the Ministry of Social Welfare and the Council of Persons with Disabilities reserve a share of training and finance for persons with disabilities, although no informant could point to a policy or regulation that actively supports youth employment beyond these.

The Sudanese Labour Code 1997 could serve as a stepping stone for youth employment programmes while providing protection for young people and women. In particular, Chapter IV of the Code sets out provisions relating to working conditions, working hours, and the types of activities in which young people and women may engage.⁵⁸ Sudan has also ratified a number of International Labour Organization (ILO) conventions and participates in tripartite consultation mechanisms that are relevant to youth employment.⁵⁹

Youth consultations with government agencies, including the 2024 discussion between the Ministry of Finance and Economic Planning and the Sudan Youth Council, highlighted government interest in supporting youth employment and expanding the role of the private sector in creating employment opportunities. For instance, the Ministry of Finance and Economic Planning expressed its willingness to enhance opportunities for youth by promoting productive sectors and encouraging private-sector actors to create new employment opportunities. The ministry also identified the microfinance window as an instrument for expanding economic opportunities, supporting productive projects, and reducing unemployment. During this discussion, the ministry emphasised the need to capitalise on available opportunities, particularly in agriculture, to develop investment partnerships, while supporting vocational and craft training centres to strengthen young people's skills. Most importantly, the government also expressed interest in leveraging local and international civil society organisations to expand access to training and skills-development programmes.⁶⁰

Implications for programming. Finance is the binding constraint on both sides of the labour market: employers (74% growth, 61% hiring) and youth (93% of the self-employed), and it is a constraint of terms as much as of supply: collateral, cost, disbursement delays and fear of default. That argues for programme instruments that do not run through the current bank and microfinance conditions, such as matched grants, in-kind working capital, group lending and savings groups, and for using the small number of functioning

⁵⁷ FEWS NET, [Sudan Food Security Outlook](#) (2026).

⁵⁸ Sudanese Government, [Labour Code 1997](#).

⁵⁹ International Labour Organization (ILO), [Ratifications of ILO Conventions – Ratifications for Sudan](#).

⁶⁰ Ministry of Finance and Economic Planning, [Government interest in supporting youth employment opportunities](#) (2024).

windows (Zakat, cooperatives, the graduates' scheme) as delivery partners rather than building parallel ones. On the regulatory side, taxes, fees and licence costs are the realistic entry point for advocacy with state authorities, especially in White Nile and Khartoum where they dominate.

Rules and norms: who gets in

The formal rules of the labour market matter less in the assessed localities than three informal ones: the fees and connections that decide who can operate, and the gender, displacement and disability norms that decide who is allowed to try. Nepotism and favouritism is the systemic problem youth name most often (41%), ahead of weak government support (32%) and corruption (26%); 41% think some groups are treated unfairly in access to work, and those who do name persons with disabilities (44%), young women (36%), youth with low education (29%) and displaced youth (24%), attributing it above all to employer bias (53%). Employers confirm the preference for known workers (23%), and in a market with no way to verify skills that preference is not irrational; the practical response is to supply the missing signals (a certificate that means something, a referral from a known intermediary, a probation period whose cost is shared) rather than to campaign against connections.

For young women the constraint is stated more openly by others than by women themselves: half of employers are not open to hiring them and 42% cite restrictions on women's mobility, while only 30% of young women say gender roles limit their ability to work, naming household responsibilities (33%), mobility (22%), a limited set of acceptable jobs (15%) and not being allowed to work (15%). Care responsibilities do not keep women out of work (71% of working women have them) but cut their hours (42%), and the focus groups are precise about what makes families accept: security, no mixed settings, short distances and daylight hours. For displaced youth the mechanism is loss rather than refusal: 74% say displacement affects their access to work, through lost assets and capital (80%), mobility (36%), discrimination (31%), lost networks (29%) and documents (17%), and only 13% of employers are not open to hiring them. For youth with a functional difficulty (14% of the sample), 59% say their disability affects their access to work, through physical access (59%), communication (34%) and stigma (33%), and they are the group most often named by other youth as treated unfairly; the disabled persons' associations in Gedaref, Ar Rahad, Ad Damer and Kassala are already the channel through which their members find work and are the natural partner. Adolescents (15–17) are the worst paid and least protected group and should be a target for education-linked support rather than for placement.

4.3. Private sector engagement and programming readiness

The private sector demonstrates a willingness to participate in youth employment programmes, creating an enabling environment for youth-focused interventions. Notably, 58% of employers expressed their willingness to engage in such programmes, while a further 22% indicated that they might participate. Willingness is highest in services (64%) and manufacturing (62%) and lowest in trade (51%) and agriculture (52%); trade also has the largest share of outright refusals (27%). Willingness extends to public works: 51% of employers said they would take part in labour-intensive works and a further 22% might. Among the 20% of employers who expressed no interest in participating, the most commonly cited reasons were a lack of alignment between programme interventions and business needs (60%) and insufficient financial capacity to hire or train youth (41%). The survey did not ask for examples of misalignment, but the conditions employers attach to participation show what alignment means to them: stipend or wage support for the placement period (47%), youth trained before placement (33%), tools or equipment (32%) and mentorship (17%), and their main concerns about hiring youth are lack of experience (54%), reliability and discipline (37%), low productivity (31%) and early turnover (27%). A few employers explained their refusal in their own words: the business is specialised for women only, young workers "leave work without a clear reason", or the work is too hard for young people.

Asked what support would help their businesses hire or train youth, employers most often named wage subsidies (62%), access to finance for the business (53%), equipment and tools support for the business (44%),

tax reductions (18%), and training partnerships (17%). These employers' needs mirror the broader picture of operational disruption documented in the UNDP report⁶¹. Enterprises and firms operating in the industrial zones (Khartoum) have in many cases relocated elsewhere. A return to some of these areas is widely viewed as unviable due to decreased security, lack of infrastructure rehabilitation and the financial cost of re-establishing there. MSMEs also reported a significantly reduced capacity and availability of human capital: displacement, loss of personnel and established employee networks.

Read together, **the employer and youth findings point to three distinct types of opportunity** rather than one. The **first is direct placement into existing vacancies**, strongest in services and manufacturing where skilled technical and casual roles are open and 42% and 41% of employers expect to hire.

The second is work-based learning, since 22% of employers currently take apprentices or trainees and a further 11% did so previously, 32% offer on-the-job training, 18% formal apprenticeships and 10% internships, with manufacturing (30% apprenticeships) and services (22%) the most active, and employers ask mainly for stipend or wage support (59%), toolkits (31%) and training materials (24%) to host one or two unskilled youth.

The third is self-employment support, which is the route 77% of youth prefer, the pathway 64% of employers consider most realistic and, in most of trade, the only one.

The barriers identified in section 2 map onto these routes: lack of jobs, experience and nepotism are placement-side barriers best addressed through employer engagement, transparent recruitment and job matching (which 55% of employers said would help them); lack of capital, tools and market access are enterprise-side barriers best addressed through finance, business development services and market linkages; and mobility, safety and care constraints cut across both and determine whether young women can use either route. The pathways section below and Table 4 apply this distinction by state and sector.

⁶¹ UNDP, [Sudan Private Sector Engagement Strategy](#) 2026–2028 (April 2026).

4.4. Sectoral viable pathways: state-wide analysis

To identify viable priority pathways at the state level, findings from the youth and employer surveys were incorporated into a custom sectoral pathways analytical framework developed for this assessment. The analysis calculates two key figures to identify viable pathways: an employer mean score and a youth mean score, both derived from the average performance across all indicator metrics detailed in Annex I. Employer scores are classified as weak (less than 31.1), moderate (between 31.1 and 36.2), or strong (greater than 36.2), while youth scores are classified as weak (less than 50.5), moderate (between 50.5 and 54.7), or strong (greater than 54.7). These thresholds are based on national tertile cut-points, calculated across all state–sector data. The findings were cross-tabulated to identify seven categories of pathways, as explained below. These categories reflect the combination of labour demand and supply, allowing sectors and states to be differentiated according to the strength and potential of their appropriate employment pathways.

Each state–sector pair is classified into one of the following categories:

- *Priority pathway: strong from both the youth and the employer perspective. High employer viability and strong youth outcomes and preferences.*
- *Promising pathway: strong on one dimension and moderate on the other. Opportunity to strengthen employer or youth dimensions.*
- *Employer-ready, youth uptake needed: strong employer viability but weak youth outcomes and preferences. Employment opportunities exist but are not translating into youth engagement.*
- *Youth-preferred, capacity-constrained: strong youth preference and outcomes but weak employer viability. Youth report a strong preference, but the sector is not reporting a stable, well-paying or accessible opportunity.*
- *Moderate pathways: moderate on both sides. Neither clearly strong nor clearly weak.*
- *Fragile pathways: weak on one dimension, and moderate on the other.*
- *Weak pathways: weak on both dimensions. Neither youth nor employer outcomes support this as a viable sector at the moment.*

This section presents the priority pathways identified, analysed at the state level and supplemented with relevant qualitative findings. In this analysis, a priority pathway refers to a specific sector-and-state combination that achieves high performance across both employer demand and youth outcome indicators, whereas classifications are the broader labelling categories (such as promising, fragile, or weak) applied to all evaluated pairs. Particularly, priority pathways represent these dual indicators to highlight high-performing sectors in each target state. Further details and specific indicators for the calculation are provided in Annex I.

- *Priority pathways are geographically concentrated, present in fewer than half of the states in the study area.*
- *Priority classifications are distributed across sectors, with agriculture, manufacturing and services contributing equally. Trade was not identified as a priority sector in any of the states, although there are states with a more promising outlook.*

The priority classification reflects an alignment between employer demands and youth outcomes, rather than youth engagement alone. Priority pathways represent dual opportunities for programming, guiding where targeted interventions should be deployed.

Figure 8: Viable pathways by state, derived from youth and employer survey findings

	Agriculture	Manufacturing	Services	Trade
Central Darfur	Weak emp 27.1 (n=8) · youth 47 (n=36)	Weak emp 28.3 (n=20) · youth 46.7 (n=18)	Employer-ready, youth uptake needed emp 36.4 (n=25) · youth 50.4 (n=12)	Youth-preferred, capacity-constrained emp 19.5 (n=17) · youth 55.7 (n=34)
Gedaref	Employer-ready, youth uptake needed emp 53 (n=11) · youth 49.6 (n=6)	Priority emp 36.7 (n=11) · youth 59.7 (n=16)	Priority emp 46 (n=30) · youth 54.8 (n=22)	Promising emp 35.6 (n=23) · youth 60.7 (n=12)
Kassala	Promising emp 40 (n=30) · youth 54.4 (n=26)	Moderate emp 35.5 (n=43) · youth 50.6 (n=33)	Promising emp 41.1 (n=68) · youth 52.5 (n=62)	Moderate emp 34.1 (n=44) · youth 52.6 (n=85)
Khartoum	Fragile emp 13 (n=4) · youth 53.2 (n=3)	Moderate emp 32.3 (n=6) · youth 52 (n=7)	Fragile emp 26.5 (n=7) · youth 50.5 (n=28)	Weak emp 30.8 (n=44) · youth 46.7 (n=31)
North Kordofan	Youth-preferred, capacity-constrained emp 29.7 (n=15) · youth 59.3 (n=9)	Fragile emp 36.2 (n=17) · youth 48.5 (n=8)	Priority emp 38.4 (n=41) · youth 58.8 (n=32)	Fragile emp 27.2 (n=23) · youth 53.8 (n=45)
River Nile	Priority emp 37.6 (n=16) · youth 61.4 (n=9)	Promising emp 37.6 (n=35) · youth 54.5 (n=35)	Promising emp 43.7 (n=52) · youth 54.7 (n=30)	Promising emp 35.2 (n=28) · youth 55.4 (n=42)
South Darfur	Priority emp 36.2 (n=28) · youth 61.4 (n=34)	Priority emp 36.8 (n=34) · youth 59.8 (n=16)	Promising emp 32.9 (n=57) · youth 54.9 (n=30)	Youth-preferred, capacity-constrained emp 23.7 (n=40) · youth 58.3 (n=67)
South Kordofan	Fragile emp 28.9 (n=7) · youth 51.7 (n=31)	Fragile emp 31.3 (n=18) · youth 49.6 (n=12)	Fragile emp 36.1 (n=35) · youth 46.1 (n=26)	Fragile emp 31.7 (n=30) · youth 48.1 (n=67)
White Nile	Moderate emp 32.9 (n=5) · youth 50.6 (n=8)	Weak emp 27.5 (n=11) · youth 47.3 (n=13)	Fragile emp 34.1 (n=16) · youth 46.4 (n=8)	Weak emp 30.6 (n=31) · youth 48.7 (n=23)

Priority or promising pathways were identified in five states: Kassala, South Darfur, North Kordofan, Gedaref and River Nile. In the other four, no state–sector pair reached the threshold on both dimensions. In Khartoum, White Nile and South Kordofan no sector scored strong on either side (all were moderate, fragile or weak pathways), reflecting weak employer viability in Khartoum’s small and disrupted employer sample, low youth outcome scores in White Nile and South Kordofan, and small sector samples in all three; in Central Darfur services scored strong on the employer side but weak on youth outcomes (employer-ready, youth uptake needed) and trade the reverse (youth-preferred, capacity-constrained). These states are not without opportunity, and the validation workshop with EMPOWER field teams identified candidate activities in each (crop farming, solar maintenance, bike repair and food processing in Central Darfur; groundnut and sorghum farming, bread-making and electrical repair in White Nile; see the suggestions for moderate and fragile pathways below and the state annexes), but the survey evidence does not yet support a priority label there. Within the five states, qualitative findings reveal distinct gendered patterns in the specific economic activities associated with each sector. These findings and associated recommendations, which include expert opinions of the EMPOWER programme team, aim to provide practical, state- and sector-specific guidance for programmatic interventions. The objective is to provide contextually relevant recommendations ensuring that interventions reflect both market demand and the gendered realities of youth economic engagement. The key takeaways are:

*Table: Top-scoring sector for employers and for youth in each state (composite scores from Figure 8; n = employers or working youth in the sector; * fewer than 30 respondents, indicative only)*

State	Highest employer score (sector, score, n)	Highest youth score (sector, score, n)	Priority / promising pairs
Gedaref	Agriculture (53.0; n=11*)	Trade (60.7; n=12*)	Priority: manufacturing, services; promising: trade
River Nile	Services (43.7; n=52)	Agriculture (61.4; n=9*)	Priority: agriculture; promising: manufacturing, services, trade
South Darfur	Manufacturing (36.8; n=34)	Agriculture (61.4; n=34)	Priority: agriculture, manufacturing; promising: services
Kassala	Services (41.1; n=68)	Agriculture (54.4; n=26*)	Promising: agriculture, services
North Kordofan	Services (38.4; n=41)	Agriculture (59.3; n=9*)	Priority: services
Khartoum	Manufacturing (32.3; n=6*)	Agriculture (53.2; n=3*)	None (moderate, fragile or weak)
White Nile	Services (34.1; n=16*)	Agriculture (50.6; n=8*)	None (moderate, fragile or weak)
South Kordofan	Services (36.1; n=35)	Agriculture (51.7; n=31)	None (all fragile)
Central Darfur	Services (36.4; n=25*)	Trade (55.7; n=34)	None (employer-ready services; youth-preferred trade)

- *Women's economic activities cluster consistently around personal services, textiles and food-related economic activities, while men's cluster around construction, technical trades and transport. This pattern recurs across states with different priority/promising sectors, suggesting that gendered preferences across economic activities are shaped by broader social norms as well as geographic dynamics; section 2.1 sets out the drivers (household responsibilities, mobility restrictions, the narrow range of socially acceptable jobs and thinner access to finance and markets) that push young women towards home-based self-employment in these activities.*
- *Digital/ICT and health services emerge as a common entry point for both male and female youth specifically in North Kordofan, River Nile and Gedaref. The digital demand is modest but consistent: 6% of employers overall (13% in services) named digital or ICT workers as a priority hire, 24% said ICT skills are among those most lacking in applicants and 30% would prioritise digital skills in training, while 33% of youth want to acquire digital skills. Computer applications, phone and computer repair, online marketing and, in Atbara and Gedaref, programming and networks were the digital activities key informants named, and 63% of youth own a smartphone and 46% have internet access, although a third have neither. Training providers in New Halfa and Kassala said digital courses are weak or absent, which makes this a supply-side gap as much as a demand signal.*
- *Agriculture shows the most gender differentiation and is primarily identified by men, focused on crop farming.*
- *Recommendations converge on combining technical skills training with market linkages and enterprise support rather than training alone. Interventions would be beneficial if they consider skills building supplemented with a parallel investment in the market systems and financial access needed to convert skills into viable livelihoods.*
- *River Nile (all four sectors), Gedaref and South Darfur (three each) show the broadest spread of priority and promising pathways, against two in Kassala and one in North Kordofan. Given the small sector samples, this spread should be read as indicative of where local market conditions are more favourable rather than as a ranking of states.*

Gedaref's agriculture is a case in point. Employers scored it the strongest of any state–sector pair in the dataset (53.0), but only six of the young people interviewed in Gedaref had agriculture as their main activity and their outcome score was weak (49.6), so it is classified as employer-ready with youth uptake needed rather than as a priority pathway. Given the state's sorghum, sesame, millet and groundnut economy, the validation workshop treated it as a pathway to develop through the value chain rather than through direct farming, along two routes: wage employment, by linking young people to commercial farms and labour contractors with attention to terms of employment, transport and safety; and self-employment, through groundnut oil pressing, agricultural inputs and extension services, mechanisation and aggregation, supported by business development services, finance and market linkages.

Table 4: Priority and promising pathways and recommendations for intervention, derived from youth and employer survey findings

Ideal pathway (sector)	Pathway categorisation (Figure 8)	Preferred economic activity	Recommendations for intervention
Kassala			
Agriculture	Promising	• Rainfed farming	• Strengthen access to agricultural skills and inputs. • Improved production practices. • Stronger market linkages, particularly in rainfed farming and livestock-related activities. • Address the field-labour gap reported by 64% of agricultural employers through organised labour linkage (youth labour groups linked to commercial farms and contractors), youth-run mechanisation and input services, and decent-work standards for seasonal work (written terms, transport, safety), rather than by expecting youth to return to unsupported casual farm labour.
Services	Promising	• Female: henna, beadwork, make-up works, sewing/tailoring, and food preparation services • Male: construction (daily labour), transport, electrical and mechanical work, and barbering	• Prioritise market-driven TVET and skills development, combined with apprenticeships, job placement, and support for youth-led microenterprises. • Particular attention should be given to gendered divergence to ensure beneficiaries' preferences and market demand are taken into account.
South Darfur			
Agriculture	Priority	• Male: crop farming, livestock rearing	• Prioritise crop production and agricultural value-chain opportunities through improved access to inputs, technical skills, markets, storage and enterprise support.
Manufacturing	Priority	• Female: handicrafts (palm-frond work, crochet, producing stoves)⁶² • Male: food processing, handicrafts	• Support skills upgrading, product quality, market access and small-enterprise development in handicrafts and food processing, while expanding opportunities for women in higher-value manufacturing and processing activities.
North Kordofan			
Services	Priority	• Female: health services (first aid and nursing)⁶³, digital/ICT works • Male: construction, electrical and mechanical works, digital/ICT	• Develop demand-responsive TVET and digital skills linked to health, construction, mechanics, electrical work, driving and ICT.

⁶² Handicrafts covers the small-scale manual production activities named in the focus groups: palm-frond weaving, crochet and embroidery, beadwork, pottery, soap-making and the making of improved stoves. Blacksmithing and carpentry are treated as skilled trades rather than handicrafts.

⁶³ Health-related activities are listed because young people named them. Whether EMPOWER can support them depends on programme scope, the regulatory requirements attached to health service delivery and the associated risks, which the partners flagged at validation; they are retained here as evidence of demand, not as a recommended pathway.

Ideal pathway (sector)	Pathway categorisation (Figure 8)	Preferred economic activity	Recommendations for intervention
		works, driving, technical works, domestic work, restaurant	Combine training with apprenticeships, employer linkages and enterprise/start-up support to facilitate entry into employment and self-employment.
Agriculture	Youth-preferred, capacity-constrained <i>employers n=15* · working youth n=9*</i>	- Crop farming is the activity most often named as suitable after petty trade (35% of youth, the same share among young women and men); livestock keeping 7% 42% of youth see agriculture as one of the sectors with the most opportunities, after trade (78%); 7 of the 121 working youth are in crop farming	- Support agriculture as a productivity and income pathway rather than a stand-alone employment solution: inputs, improved practices and market linkages for sorghum, millet and livestock, with attention to seasonal flooding, mesquite encroachment and uncertain returns. - Link youth to the casual and semi-skilled labour that agricultural employers demand through organised labour linkage, and address the constraints these employers name to hiring: lack of finance (73%), labour costs (60%) and weak business growth (47%).
Gedaref			
Manufacturing	Priority	- Female: baking, handicrafts, soap production - Male: handicrafts, blacksmithing	- Prioritise technical and business skills for food processing, soap production, handicrafts and blacksmithing, alongside access to equipment, finance and markets. - Support women to expand baking and other food-processing activities into viable enterprises.
Services	Priority	- Female: cleaning, cooking, daily labour, design and embroidery, domestic work, gift wrapping, health services (vaccination campaign, pharmaceuticals, first aid, nursing), painting, henna, beadwork, make-up, restaurant (labour), teaching, marketing and sales, office work, sewing/tailoring - Male: bean cleaning (cleaning and sorting beans for sale), construction, driving, mechanics, rickshaws, daily labour, digital/ICT works, barber, teaching	- Develop gender-responsive service-sector skills pathways, prioritising women's participation in personal, tailoring, food and health services and men's access to mechanics, construction, driving and ICT. - Strengthen linkages between TVET and apprenticeships, employers and microenterprise support.
River Nile			
Agriculture	Priority	No specific activity was named by youth in River Nile focus groups. At the validation workshop the pathway was defined through the value chain (input supply, logistics, agro-processing including food processing, horticulture, date palm, fodder and livestock, and rehabilitation of irrigation infrastructure) rather than direct crop farming.	Strengthen agricultural production, value addition and market linkages, while promoting youth skills in higher-value activities such as processing, aggregation, marketing and agricultural services.

Ideal pathway (sector)	Pathway categorisation (Figure 8)	Preferred economic activity	Recommendations for intervention
Services	Promising	- Female: henna, beadwork, make-up, health services (first aid and nursing), judicial services, marketing and sales, digital/ICT works - Male: health services, digital/ICT works, technical works	- Support demand-responsive training and enterprise development in health, ICT, technical and personal services. - For women, support combining skills development with business support and market linkages in personal, digital and service-based enterprises.
Central Darfur			
Services	Employer-ready, youth uptake needed <i>employers n=25* · working youth n=12*</i>	- Female: construction-related daily labour, salaried work, vocational services, design and embroidery - Male: rickshaw transport, digital/ICT services, carpentry, blacksmithing, mechanics, construction, painting, technical and vocational works, daily labour	- Prioritise demand-responsive skills development and apprenticeships in transport, mechanics, carpentry, blacksmithing, construction, painting, ICT and other technical services, linked to local market demand. - Combine skills development with job matching, apprenticeships and support for youth-led microenterprises, particularly where formal employment opportunities are limited. - Support access to basic tools, equipment and working capital for service providers, while strengthening linkages with local businesses and contractors.
Trade	Youth-preferred, capacity-constrained <i>employers n=17* · working youth n=34</i>	- Female: trade in food and consumer commodities, small business - Male: water vending, street vegetable trade, fuel trade, small-scale trade, kiosk trade, retail trade, trade in food and consumer commodities	- Support youth to enter and strengthen small-scale and retail trade through business skills, market information, access to working capital and appropriate business equipment. - Prioritise activities with established local demand, including food and consumer commodities, vegetables and kiosk-based retail, while considering the security, liquidity and market-access constraints affecting traders in Central Darfur. - Strengthen market linkages and trader networks to improve access to suppliers and customers and reduce barriers to participation.
White Nile			
Agriculture	Moderate <i>employers n=5* · working youth n=8*</i>	- Female: crop farming, agriculture - Male: crop farming, livestock rearing	- Prioritise agricultural livelihoods through improved access to inputs, technical skills, livestock services and market linkages. - Strengthen opportunities for youth in rainfed farming, livestock-related activities and agricultural services, while supporting pathways from daily agricultural labour towards more sustainable self-employment and enterprise activities.
Services	Fragile <i>employers n=16* · working youth n=8*</i>	Female: personal services (henna and make-up), salaried work, daily labour, digital/ICT	Expand demand-responsive vocational training and apprenticeships in technical trades, linked to local employment and self-employment opportunities.

Ideal pathway (sector)	Pathway categorisation (Figure 8)	Preferred economic activity	Recommendations for intervention
		Male: technical work, daily labour, vocational trades, transport	- Support women's participation in personal and digital services through skills development, enterprise support and market linkages. - Where daily labour remains an important entry point, strengthen linkages between young workers and employers while promoting safer and more stable employment arrangements.
Khartoum			
Manufacturing	Moderate <i>employers n=6* · working youth n=7*</i>	- Female: sewing and tailoring, food production and preparation - Male: food processing (bakery and preparation of food products), carpentry and furniture, blacksmithing and metalwork, production and repair-related workshops	- Prioritise practical, market-driven skills development and apprenticeships in food processing, carpentry, metalwork, mechanics, sewing and tailoring, linked to trade testing and certification where feasible. - Combine training with access to tools, equipment and start-up support to facilitate entry into self-employment and small enterprises. - Support home-based and small-scale production models where mobility, transport costs or workplace accessibility constrain participation, particularly for women and persons with disabilities. - Strengthen business, financial management, marketing and digital skills alongside technical training, and link producers to local markets.
Services	Fragile <i>employers n=7* · working youth n=28*</i>	- Female: sales, digital/phone-based work and services, home-based services, domestic services, personal services - Male: construction and related skilled and casual labour, transport (tuk-tuk/rickshaw driving), electrical work, plumbing and solar installation and maintenance, mechanics and vehicle repair, digital/ICT services and digital marketing	- Prioritise short, practical and demand-responsive training in technical, digital and service-related skills, combined with apprenticeships, job matching and employer linkages. - Provide stipends, transport support and flexible training schedules to reduce the opportunity cost of participation, particularly for young people dependent on daily income. - Support youth-led service businesses through productive tools, equipment and accessible finance, including savings groups or other mechanisms that do not rely on prohibitive collateral. - Ensure training and employment services are accessible to women through adapted venues, appropriate communication, transport support and flexible working arrangements.
South Kordofan			
Trade	Fragile <i>employers n=30 · working youth n=67</i>	Female: petty trade and small business: vegetable trading; selling food, tea, dairy products and	Capitalise the trade activity youth already operate in (working capital, stock, business skills) rather than encourage occupational

Ideal pathway (sector)	Pathway categorisation (Figure 8)	Preferred economic activity	Recommendations for intervention
		ground spices; sweets, baked goods and pastries; sewing Male: petty trade and small business: shop work, mobile phones and accessories, food and consumer goods, cosmetics, vegetable trading, market-stall trading	transitions; keep support selective and demand-driven, as all four pairs are fragile. - Petty trade and small business is named as the most suitable activity by 67% of youth, 79% prefer self-employment, and 44% of working youth are already in petty trade. - Trade is named by all eight Kadugli key informants and all four youth groups as the sector that absorbs youth now, including youth with disabilities, because the former employers (ginny, weaving, factories) have closed; address the three constraints they name: working capital disbursed quickly enough to keep its value against inflation, high rents of commercial premises and transport costs, and connection-based entry. - Pair working capital with the business, market (prices, weights and measures, shelf life) and financial-literacy skills the key informants name as the gap; lighten guarantor requirements for women and provide a documents route for displaced youth, as guarantors, lost documents and distance are the barriers to finance named by the exchange company and the youth groups.
Services	Fragile employers n=35 · working youth n=26*	- Female: food preparation (sweets, baked goods, pastries), sewing and tailoring, handicrafts and embroidery; girls ask for first-aid and nursing skills - Male: casual and daily labour, construction, blacksmithing, carpentry, car mechanics and workshops, electrical work and plumbing, barbering, tuk-tuk and bus transport, services for humanitarian organisations	- Build progression routes out of casual labour into skilled technical work: casual and daily labour is the top priority worker category for 66% of employers and skilled technical workers for 51%, with the finance constraint (87% of employers) addressed alongside. - Build on the Vocational Training Centre of Kadugli Technical College (blacksmithing, electrical work, plumbing, construction, computing), which informants rate as market-relevant but short, under-equipped and costly: longer practical courses, equipment and materials, transport and fee support, and schedules and facilities that women, mothers and participants with disabilities can use. - Add job placement and apprenticeships: four key informants say no employment service exists, 2% of youth report one, and 67% of employers say linkage activities would help them find young workers.

Note: rows for Central Darfur, White Nile, Khartoum and South Kordofan cover moderate, fragile or weak state-sector pairs (Figure 8). They are listed so that every assessed state has a pathway entry, but they are not recommended for large-scale employment creation; support there should be selective and directed at protecting and strengthening existing livelihood activities. The North Kordofan agriculture row covers a youth-preferred, capacity-constrained pair (Figure 8) and rests on small samples; it is included as the state's second pathway. The South Kordofan rows were updated in October 2026 with evidence from four focus groups and eight key informant

interviews held in Kadugli in August 2026, received after the analysis deadline; the survey figures and the fragile classification are unchanged.

Sample sizes: these rows also rest on small samples. Except for South Kordofan, each pair draws on fewer than 30 employers, fewer than 30 working youth, or both (marked * in the categorisation column), so the activities and recommendations are indicative and should be verified locally before use.

Table 5: The main barriers employers and youth face to engage in the identified sectors

Gedaref			
Manufacturing – Priority Pathway			
Employer Constraints	Youth Constraints	Conclusions	Recommendations
• Demand split evenly between skilled/technical and semi-skilled labour (36% each) • Business growth and finance tied as leading barriers (54% each) • By far the highest hiring difficulty recorded in Gedaref (64%)	• Strongest income adequacy in Gedaref (81%), yet highest instability (88%) • Low activity-switching (81% unchanged in the last 12 months), in line with Gedaref's other sectors.	• Combination of high hiring difficulty and strong pay indicates a genuine skills-supply constraint. • Employers are struggling to fill roles that, once filled, pay comparatively well. • The very high instability despite strong pay points to short-term or contract-based engagement rather than a wage problem, meaning skills investment needs to be paired with support for longer or apprenticeship-to-employment pathways.	• Prioritise technical and business skills for food processing, soap production, handicrafts, and blacksmithing, alongside access to equipment, finance, and markets. • Support women to expand baking and other food-processing activities into viable enterprises. • Combine with a retention or graduated-contract incentive mechanism, so that employers who successfully hire skilled workers are encouraged to retain them rather than moving through short-term arrangements.
Services – Priority Pathway			
Employer Constraints	Youth Constraints	Conclusions	Recommendations
• Demand split between casual labour (47%) and skilled/technical roles (40%) • Lack of finance is the leading barrier (63%) • Relatively low hiring difficulty (23%)	• Income adequacy is comparatively good (64% earn above SDG 200,000) • Instability affects just over half (55%); safety evenly split (50/50) • Skills/business gap comparatively narrow (31%)	• Low hiring difficulty alongside high instability indicates a terms-of-work mismatch rather than a skills mismatch. • Employers can find workers, but financial constraints are limiting their ability to convert demand into stable, well-paid roles.	• Prioritise employer-side finance and business development support (working capital, business development services, and group/cooperative lending for women's personal-service and food-service microenterprises) • Pair with support to formalise casual engagements into more structured terms of employment: targeting women's henna, beadwork,

			sewing/tailoring, cooking, health-service, and office/admin activities, and men's construction, mechanics, driving, ICT, and barbering activities specifically.
Trade – Promising Pathway			
Employer Constraints	Youth Constraints	Conclusions	Recommendations
• Demand primarily for sales workers (39%) • Lack of finance and weak business growth are major constraints to hiring. • High hiring difficulty (48%), second only to manufacturing in Gedaref.	• Good income adequacy (67% earn above SDG 200,000), although instability in employment arrangements is high. • Widest skills mismatch among Gedaref's sectors (42% of petty traders say their skills do not match their work) • Very low activity-switching.	• Good pay and genuine hiring difficulty make trade the clearest pathway in Gedaref for skills-matching investment, specifically around sales/retail competencies matched to employers' stated demand. • The sector's informality (dominated by small and medium traders) also needs to be addressed to translate into employment stability.	• Invest in sales/retail skills training matched to employer demand. • Explore formalisation support at the market level (business registration assistance, market management support) rather than individual enterprise grants.
Kassala			
Agriculture – Promising Pathway			
Employer Constraints	Youth Constraints	Conclusions	Recommendations
• Demand for casual labour (73%), far ahead of semi-skilled (43%) and skilled/technical (33%) • Lack of finance is the leading barrier to hiring (67%), ahead of weak business growth (40%) • Business flow is strong, with 73% reporting stable and expanding operations.	• Instability is the dominant issue (77% not stable) • Income adequacy is moderate, with 54% earning above SDG 200,000 • Skills/business capacity is comparatively strong (only 10% reporting inadequate) • Low activity-switching (69% unchanged), suggesting limited alternative options despite instability.	• A finance and terms-of-employment constraint rather than a skills constraint. • Employers are expanding but structuring growth around casual labour due to limited access to capital, which explains high youth-reported instability despite a comparatively strong skills base. • Better production practices alone are unlikely to convert casual employment arrangements into stable jobs without addressing employer-side finance constraints.	• Strengthen access to agricultural skills, inputs, and improved production practices, and build stronger market linkages, particularly in rainfed farming and livestock-related activities. • Access to finance for employers should be considered (input credit, seasonal working capital) so that production translates into more stable roles rather than an expansion of casual hiring.
Services – Promising Pathway			
Employer Constraints	Youth Constraints	Conclusions	Recommendations
• Demand centred on skilled/technical labour (50%), the highest need for skills share among Kassala's priority sectors. • Weak business growth is the leading reported	• Instability is high (71% not stable) • Income adequacy is moderate (52% earn above SDG 200,000) • Safety is comparatively good (71% safe / 29%	• Kassala's strongest performing business sector and its clearest skilled-labour demand still coincide with high instability on the youth side.	• Prioritise market-driven TVET and skills development combined with apprenticeships, job placement, and youth-led microenterprise support.

barrier (56%), ahead of the skilled-workforce gap (34%) and lack of finance (29%) • Business flow is strong (81% stable/expanding), the highest across both Kassala sectors.	report some risks or unsafe conditions) • Skills/business capacity gap is moderate (28% reporting inadequate)	• Indicates the constraint lies in job structure and terms of engagement rather than in labour supply or skills. • Training alone is unlikely to resolve this without a parallel focus on formalising engagement terms.	• Attention towards gendered divergence in activity and market demand. • Add a contract-formalisation/job-quality component for existing employers, and support group or cooperative financing models for women's personal-care and food-preparation microenterprises (henna, beadwork, sewing/tailoring, food preparation) • Given the informal, often home-based nature of these activities, link men's construction, transport, electrical/mechanical, and barbering activities to structured apprenticeships matched to stated employer demand for skilled/technical labour.
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North Kordofan

Services – Priority Pathway

Employer Constraints	Youth Constraints	Conclusions	Recommendations
• Demand led by skilled/technical labour (54%) • Lack of finance is the leading barrier (71%), among the highest finance-barrier figures in this table. • Relatively low hiring difficulty (32%); moderate business flow (63%)	• Moderate instability (63% not stable); strong safety (78% safe) • Moderate skills/business gap (30%) • Extremely low activity-switching (91% unchanged)	• Low hiring difficulty alongside a narrow-to-moderate skills gap indicates employers are not struggling to find suitable candidates. • Primary constraint is their capacity to offer secure terms of employment, given the highest finance-barrier figure recorded. • The very low activity-switching despite meaningful instability suggests youth are remaining in the sector out of necessity rather than because conditions are secure.	• Develop demand-responsive TVET and digital skills linked to health, construction, mechanics, electrical work, driving, and ICT. • Combine training with apprenticeships, employer linkages, and enterprise/start-up support. • Potential to include a finance or business-support track for services employers specifically, since the data indicates the main constraint is employer capacity to offer stable terms, not the supply or skill level of available youth.

River Nile

Agriculture – Priority Pathway

Employer Constraints	Youth Constraints	Conclusions	Recommendations
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• Demand centred on casual labour (50%) • Lack of finance is the leading barrier (38%), though barriers are more evenly spread than elsewhere. • Business flow is the strongest recorded in the entire dataset (88%)	• Every employed youth respondent reported instability (100% not stable), the most extreme figure across all states. • Majority report unsafe conditions (56% unsafe) • Income adequacy comparatively good (67% earn above SDG 200,000); widest skills/business gap recorded (57%)	• This is the widest divergence between youth and employers – the strongest employer performance recorded anywhere alongside universal youth-reported instability, majority-unsafe conditions, and the widest skills gap. • This reflects both a genuine skills deficit and a serious job-quality/safety problem, distinct from the largely finance-driven constraints seen elsewhere, and needs to be treated as a two-part problem rather than addressed through skills investment alone.	• Strengthen agricultural production, value addition, and market linkages. • Promote youth skills in high-value activities such as processing, aggregation, marketing, and agricultural services combined with a dedicated occupational safety and working-conditions component, given the majority-unsafe finding in a confirmed priority pathway. • No gendered qualitative activity data available.
Services – Promising Pathway			
Employer Constraints	Youth Constraints	Conclusions	Recommendations
• Demand led by skilled/technical labour (54%) • Lack of finance is the leading barrier (48%) • Second-highest hiring difficulty recorded in the dataset (62%); very strong business flow (87%)	• Balanced outcomes: income and stability evenly split (50/50) • Safety comparatively strong (70% safe) • Moderate skills/business gap (28%)	• High hiring difficulty alongside balanced, comparatively positive youth outcomes makes this a skills-matching case. • Sector where employers are expanding (stable) and youth outcomes are reasonable, but employers still cannot find enough qualified candidates.	• Support demand-responsive training and enterprise development in health, ICT, technical, and personal services. • For women, combine skills development with business support and market linkages in personal, digital, and service-based enterprises. • Prioritise this sector as a strong candidate for scaling existing training models given its otherwise stable baseline, rather than needing large finance or job-quality fixes.
Trade – Promising Pathway			
Employer Constraints	Youth Constraints	Conclusions	Recommendations
• Demand led by sales workers (39%) • Finance (50%) and labour costs (43%) lead as barriers. • Labour costs are a prominent hiring constraint (43%), second only to manufacturing (57%) in River Nile. • Strong business flow (79%)	• Safety strong (81%); instability moderate (57%) • Income adequacy appears comparatively strong (64%)	• Comparatively favourable youth-side outcomes relative to River Nile's other sectors. • Labour costs featuring prominently as an employer constraint, as in manufacturing. • This suggests cost-related barriers to formal hiring.	• Consider sales/retail skills matched to employer demand alongside incentive mechanisms addressing labour-cost barriers to formal hiring. • No gendered qualitative activity data available for trade in River Nile.
Manufacturing – Promising Pathway			
Employer Constraints	Youth Constraints	Conclusions	Recommendations

• Demand led by skilled/technical (51%) and sales (43%) • Finance (66%) and labour costs (57%, second-highest recorded) both lead as barriers. • Weaker business flow than River Nile's other sectors (54%)	• Strong income adequacy (80%) but very high instability (88%), similar to Gedaref's manufacturing sector. • Safety near-even (51% safe / 49% unsafe)	• The recurrence of the high-pay, low-security pattern in a second state's manufacturing sector suggests this may be characteristic of manufacturing specifically rather than a single-state issue. • The highest labour-cost burden recorded in River Nile may be constraining employers' ability to offer more stable engagement.	• Consider a contract-structuring or retention incentive similar to Gedaref. • Think through cost-relief mechanisms addressing the labour-cost barrier specifically. • No gendered qualitative activity data available for manufacturing in River Nile.
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South Darfur

Agriculture – Priority Pathway

Employer Constraints	Youth Constraints	Conclusions	Recommendations
• Demand led by casual labour (75%), followed by skilled/technical (58%) and semi-skilled (53%) roles. • Demand spans all skill levels but is concentrated towards casual labour (similar to manufacturing in South Darfur) • Lack of finance is the leading barrier by a wide margin (80%), the single highest finance-barrier figure recorded across all states. • Business flow is strong (71% stable/expanding) and hiring difficulty is comparatively low (37%)	• Instability affects the majority of youth (71% not stable) • Income adequacy is weak (only 29% earn above SDG 200,000) • Skills/business capacity gap is comparatively wide (47% reporting inadequate), among the widest recorded in the dataset. • Low activity-switching (79% unchanged), indicating limited alternative options.	• South Darfur agriculture shows the same finance-driven constraints to hiring, although this is the highest single finance-barrier figure recorded anywhere in the dataset (80%). • Comparatively wide skills/business capacity gap (47%) and weak income adequacy (29%), so pay is as much a concern as security and capacity when youth are engaged. • This points to a combined finance-and-skills constraint rather than a finance-only one, with low activity-switching (79% unchanged) reinforcing that youth have limited alternatives despite the instability.	• Prioritise crop production and agricultural value-chain opportunities through improved access to inputs, technical skills, markets, storage, and enterprise support. • Access to finance should be considered for agricultural employers given the highest single finance-barrier figure recorded. • Targeted skills/business capacity building given the comparatively wide skills gap (47%) recorded alongside it.

Manufacturing – Priority Pathway

Employer Constraints	Youth Constraints	Conclusions	Recommendations
• Demand led by casual labour (73%), then semi-skilled (59%) and skilled/technical (50%) roles. • Lack of finance is the leading barrier by a wide margin (73%), among the highest recorded across all states. • Business flow is strong (86% stable/expanding)	• Instability is high (75% not stable) but income adequacy is moderate (56% earn above SDG 200,000) • Activity-switching is the lowest recorded (94% unchanged), indicating strong sustained employment.	• The sustained duration of youth in this sector (94% unchanged activity) despite high instability indicates very limited alternative livelihood options. • As with agriculture in this state, the dominant constraint is employer finance rather than youth skills alone.	• Support skills upgrading, product quality, and market access alongside small-enterprise development in handicrafts and food processing. • Expand opportunities for women in higher-value manufacturing and processing activities.

	• Skills/business capacity gap is moderate (25% reporting inadequate)		• Pair with an enterprise finance/capital-access component for handicraft and food-processing businesses as a priority. • The dominant finance barrier means skills upgrading alone is unlikely to shift the sector out of casual, unstable engagement.
Services – Promising Pathway			
Employer Constraints	Youth Constraints	Conclusions	Recommendations
• Demand led by skilled/technical labour (53%) and casual labour (51%) • Lack of finance (63%) and a skilled-workforce gap (49%, among the highest recorded) are the two leading barriers. • Just over half of employers report difficulty finding qualified youth (51%)	• Income adequacy is weak (67% inadequate) • Instability is high (84%, among the highest recorded) • Safety is comparatively better (70% safe)	• High hiring difficulty and a skilled-workforce gap on the employer side. • High instability and weak income on the youth side. • Indicates skills-matching investment could meaningfully improve outcomes on both sides, distinct from the largely finance-driven pattern elsewhere in South Darfur.	• Prioritise skills-matching investment alongside continued attention to the finance barrier common across South Darfur's sectors.

Note: Table 5 covers the 13 priority and promising pairs, where the employer and youth samples are large enough to characterise constraints. For the other pairs, and for the four states without a priority or promising pathway, see Figure 8, the nine-state summary table in section 4.4, the moderate and fragile rows of Table 4 and the state annexes, which give the barriers to employment for every state.

Suggestions for moderate and fragile pathways:

In the four states where no state-sector pair reached priority or promising, the pathway analysis still identifies where youth are already earning and where employers are hiring; the guidance is to support those activities selectively rather than to expand employment at scale.

Khartoum (manufacturing moderate; agriculture and services fragile; trade weak). Petty trade and small business is the activity youth name as most suitable (70%), followed by crop farming (18%) and construction (15%); capital is the binding constraint, named by 64% of youth as the main challenge to earning an income and by 80% of employers as the top constraint to growth. The employer sample is thin (61 interviews, concentrated in a single sub-sector cluster and without a locality breakdown), so the Table 5 rows for manufacturing and services rest mainly on the youth survey and the focus groups: finance-first support to small trade and service businesses and home-based production.

White Nile (agriculture moderate; services fragile; manufacturing and trade weak). Trade is the preferred sector for 75% of youth and agriculture and livestock for 19%; petty trade (60%) and crop farming (44%) lead the preferred business types. Employers are finance-constrained (75%) and 62% report difficulty finding qualified youth. The Table 5 rows point to agricultural livelihoods (inputs, skills, livestock services) and to personal and technical services.

South Kordofan (all four pairs fragile). Trade and small business is the sector with the highest self-employment potential for 67% of youth, and 44% of working youth are already in petty trade; crop farming (40%) and livestock (21%) follow. Employer demand is more active than in most states (49% recruited in the past year,

51% expect to) but finance-constrained (87%). The focus is on capitalising the trade and agricultural activity youth already operate in and on progression routes out of casual labour.

Central Darfur (services employer-ready, youth uptake needed; trade youth-preferred, capacity-constrained; agriculture and manufacturing weak). Some 68% of youth prefer trade; 48% of employers prioritise skilled workers and 66% expect to recruit skilled technical workers, while insecurity and conflict, weak demand, transport costs, inflation and lack of finance (68%) are the constraints they name to growth and hiring. The Table 5 rows point to demand-responsive skills and apprenticeships in transport, mechanics, carpentry and construction, and to small-scale and retail trade with working capital and market linkages.



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CONCLUSION

The assessment found that Sudan's youth labour market is characterised by a combination of severe economic disruption, limited employment opportunities and persistent structural barriers that have been intensified by the conflict. **Across the assessed states, most of the surveyed youth (59%) were not engaged in employment or income-generating activities, while those who were working were concentrated largely in informal and often low-income activities, particularly petty trade, agriculture and a diverse range of services.** These challenges are compounded by gaps in education and skills, limited access to capital (the main challenge for 70% of youth), weak employment opportunities and gender-specific constraints, with female youth consistently facing lower employment participation and earnings. **At the same time, the findings demonstrate that youth exclusion is not driven by labour supply constraints alone:** employers also face limited access to finance (the constraint on new vacancies for 61%), weak demand, infrastructure and input constraints, and difficulties finding appropriately skilled workers. **The result is a labour market in which available youth skills, aspirations and employer demand do not consistently translate into sustainable or adequately remunerated employment.**

The assessment identified meaningful opportunities and pathways for youth economic inclusion, provided that interventions are differentiated according to local market conditions rather than applied uniformly across states. Services, agriculture, manufacturing and trade each present opportunities, but their potential differs in terms of youth preferences, employer demand, skills requirements, business stability and inclusiveness. The state-level pathway analysis therefore highlights the importance of linking youth aspirations with demonstrated employer demand and growth potential. Agriculture and service-related activities are particularly relevant in most assessed states, while occupations in manufacturing present opportunities in South Darfur and Gedaref. However, the assessment cautions against treating youth preference alone as evidence of a viable employment pathway. Trade, for instance, is highly accessible and the most preferred pathway among youth (77% prefer self-employment and petty trade is the activity most often named as suitable), but existing businesses report relatively limited recruitment and growth. Conversely, sectors with stronger employer demand may require targeted measures to overcome skills, access or inclusion constraints.

In the four states without a priority or promising pathway (Khartoum, White Nile, South Kordofan and Central Darfur), every state-sector pair scored moderate, fragile or weak on at least one side. This does not mean there is nothing to do there: the state-level analysis identifies the activities youth are already earning from and employers are hiring for (trade and small business everywhere, agriculture in White Nile and South Kordofan, services in Central Darfur and Khartoum), and section 4.4 sets out targeted measures for them, selective and finance-first, directed at protecting and strengthening existing activities rather than at large-scale employment expansion.

Most notably, the findings support an approach to youth economic inclusion that moves beyond stand-alone training or short-term employment support towards integrated, demand-driven livelihood pathways. Skills development should be linked to apprenticeships, employer engagement, job placement and enterprise support, while access to finance, equipment, productive inputs and markets must be addressed in parallel so that young people can convert skills into viable livelihoods. Programming should also deliberately address the barriers facing female youth, displaced youth and other groups facing exclusion, while adapting interventions to the specific conditions of each state and locality. The willingness of most surveyed employers to engage in youth employment programmes provides an important foundation for this approach, but employer support needs to respond to actual business constraints, particularly needs for finance, wage costs and equipment. Finally, fragile and weak pathways should be supported selectively to protect and strengthen existing livelihoods rather than treated as priorities for large-scale expansion. In this context, EMPOWER can play an important role in connecting youth capabilities and aspirations with viable market opportunities while simultaneously strengthening the enterprises, market systems and supporting functions required for more sustainable and inclusive employment outcomes.



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Founded in 2010 and headquartered in Geneva, IMPACT Initiatives is a leading applied research organization and the largest independent provider of data in crisis-affected contexts. Through our initiatives we enable humanitarian and other aid actors to make better, evidence-based decisions by delivering timely, relevant, and methodologically rigorous data and analysis.

Mercy Corps

Mercy Corps is a humanitarian organization founded in 1979 working alongside communities facing conflict, climate change, and economic hardship to meet urgent needs and create the conditions for lasting progress. Mercy Corps has been present in Sudan since 2004 and has since delivered large, complex, and innovative programs across the humanitarian, development, and peace nexus to hundreds of thousands of marginalized Sudanese and refugee households.

Danish Refugee Council (DRC)

Founded in 1956, DRC has worked for 70 years to support refugees and displaced people in their pursuit of a dignified life. As Denmark's largest humanitarian NGO and a leading international organisation, we work across displacement journeys – from acute crisis to long-term solutions – assisting, protecting and empowering people forced to flee. DRC has been delivering protection and emergency response interventions in Sudan since 2004. We work to protect and assist displaced populations and conflict-affected communities, bringing technical expertise in Protection, Economic Recovery, Shelter & Settlements, WASH and Infrastructure, and Humanitarian Disarmament and Peacebuilding with a strong focus on inclusion and resilience.



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ANNEXES

Annex I: Methodology – Sector and Employment Pathways Selection

Viable employment pathways were identified by triangulating employer demand-side information with youth employment outcomes and preferences. Employer data were assessed across four dimensions: stability and growth potential, demand strength, current inclusion, and adequacy of employment conditions. Indicator-level percentages meeting predefined viability conditions were calculated by sector and state, with mean scores generated for each dimension and an overall Sector Viability Score calculated as the mean across the four dimensions. Youth data were similarly grouped into broad economic divisions and assessed against employment viability indicators covering job retention, income adequacy, job stability, job duration, working conditions, and access to employment. Youth-preferred economic activities were also identified by state. The final pathway identification therefore combined the capacity of sectors to generate viable employment with youth employment experiences and preferences, with all composite scores calculated using row-wise means.

Employer-based indicators

- **Stability and growth potential:** Enterprises trading more than six years, businesses describing themselves as expanding, and sales that held or rose rather than fell. A sector losing firms scores low here regardless of how many it still has.
- **Demand strength:** Firms that took on workers in the past year, those saying they need skilled technical or semi-skilled staff, and those expecting to hire in the next.
- **Current inclusion:** Whether youth make up more than half the workforce, and whether women appear in it at all.
- **Adequate terms of employment:** Wage levels for skilled and semi-skilled workers, hours falling in the 7–8 hour band, and the absence of major safety risk. Employment on poor terms is not considered adequate.

Youth-based indicators

- **Youth preferences: Stated preference** among both working and non-working youth, scored separately and only for the three largest activities in each state, so aspiration never props up a pathway that is failing the four tests above.
- **Job retention and stability:** Youth who have not changed livelihood in the past year, and those who have held their current activity beyond six months. Churn is read as a pathway failing to hold people, not as mobility.
- **Income adequacy:** Monthly income at or above SDG 200,000, and whether youth report having traded income away for training. Both measure whether the activity supports the person doing it.
- **Safety and sustainability:** Work described as stable rather than irregular, and conditions described as safe rather than carrying risk.

Ranking

- **Every answer is reduced to one share:** the proportion of respondents meeting a stated condition. Nothing is scored from raw counts, which keeps sectors of very different sizes comparable.
- Shares are averaged within each question group first (e.g. safety and sustainability, income adequacy), then across all groups. All indicators within a group, and all groups, carry equal weight.
- Youth activities are recoded into five divisions: agriculture, manufacturing, trade, services and other, so that supply-side results can be set against employer sectors rather than against multiple separate activities.

Supporting detail: job-quality indicators by main activity

The sector scores above are computed on five broad divisions. The table below gives the same job-quality measures for the individual activities in which working youth are engaged, so that the scores can be read alongside the activity they mostly reflect. Figures are shares of working youth in the activity; income is among those reporting an income; activities with fewer than 30 respondents are marked with an asterisk and are indicative only.

Main activity	Working youth (n)	Women	Income above SDG 200,000	Income stable	Conditions safe	Want to change activity
Petty trade / small business	406	37%	50%	29%	73%	58%
Crop farming	128	38%	34%	15%	56%	76%
Construction / manual labour	123	10%	64%	17%	49%	80%
Food processing / preparation	88	69%	42%	30%	75%	55%
Casual labour (non-agricultural)	83	29%	54%	21%	60%	86%
Repair / technical work	49	8%	67%	22%	51%	53%
Regular salaried employment	39	46%	61%	74%	51%	49%
Teaching / education	32	75%	32%	44%	97%	53%
Tailoring / sewing*	28	61%	38%	18%	75%	36%
Engineering / technical profession*	26	8%	67%	46%	35%	39%
Health-related work*	25	88%	68%	60%	76%	44%
Livestock keeping*	18	22%	57%	28%	56%	44%
Agricultural wage labour*	16	38%	47%	25%	50%	75%

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