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# Gold and the war in Sudan

How regional solutions can support an end to conflict

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# Summary

- Gold has long been a conflict commodity in Sudan and continues to be the subject of intense competition between national and subnational military actors and political elites. Control and rivalry over gold was an important factor in the two largest acts of mass violence in Sudan's recent history: the October 2021 coup and the ongoing civil war since 2023.
- The multi-billion-dollar trade of gold sustains and shapes Sudan's conflict. This commodity is the most significant source of income for the warring parties – the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF) – feeding an associated cross-border network of actors including other armed groups, producers, traders, smugglers and external governments. Through gold, Sudan's civil war is deeply intertwined with the wider region, connecting distant geographies via networks of authority and violence that are not confined to nation-state borders.
- As the key backers of the SAF and the RSF, respectively, Egypt and the United Arab Emirates (UAE) have significant influence over Sudan's conflict. In recent years, most of Sudan's gold has ended up in the UAE, a gold hub that both warring parties are reliant on for clearing financial transactions. Since the outbreak of the war, the SAF, which holds the largest gold-producing areas, has increasingly sought to divert gold through Egypt, much of which is smuggled.
- While Egypt and the UAE may benefit economically in the short term from Sudan's gold trade, their continued pursuit of opposing interests in Sudan, via the scramble for valuable resources, but also in terms of security, politics and ideology, risks further fragmenting the country. The potential resulting destabilization will jeopardize the long-term strategic interests of both Egypt and the UAE in Sudan and in the broader Horn of Africa and Red Sea region.
- As allies, Egypt and the UAE should be encouraged to find common ground on their divergent regional policies, particularly as they relate to Sudan. Ultimately, the warring parties' political, military and economic reliance on Egypt and the UAE puts these external actors in a unique position to persuade the SAF and the RSF to agree a sustainable ceasefire. Egypt is also well placed to soften the existing enmity between the SAF and the UAE.

- Levers of economic power and authority – including over gold – are vital for engaging the warring parties and convincing them to participate in a sustainable ceasefire and political process. Any lasting settlement in Sudan must consider the economic realities and incentives related to the country's conflict gold and other strategic commodities. It should ensure a common vision that underlines the shared benefits of these resources – and outline how they can contribute towards Sudan's post-war reconstruction and economic resilience, as well as facilitate cross-border and regional interests.
- Policymakers must factor in and navigate both the neighbouring and regional actors who have a stake in the conflict and their varied interests. Policy solutions that are only focused on Sudan risk neglecting the critical wider cross-border environment that influences the conflict. Targeting only one part of this ecosystem – for instance by sanctioning a specific company trading in conflict gold, or a high-level SAF or RSF individual – will not fundamentally reform the supply chain, the transnational networks that gold traverses, or the intensity of the civil war.
- The multi-alignment of regional states involved in the war contributes to a more fragmented and unpredictable neighbourhood, making a political settlement more elusive and fragile. In response, like-minded partners, including the UK, US, Norway, EU and others, must seek to form an effective coalition and engage in a robust process with regional partners – including Egypt, the UAE and Saudi Arabia – on practical steps towards compromise and the reduction of hostilities required to reach a ceasefire. A high-level UK-hosted conference on Sudan, on 15 April 2025, could be an opportunity to take such discussions forward.
- The US, UK, EU and other international partners and institutions, such as the African Union and the UN, are also well placed to take tougher action that targets Sudan's illicit gold trade by establishing greater consequences and deterrents for states that benefit from Sudan's conflict gold, particularly the UAE. However, the US's need for strong Gulf partners and Egypt to resolve the conflict in Gaza, or to broaden the Abraham Accords, will likely limit how far America is prepared to push regional allies on Sudan.
- A sustainable peace will depend on convincing regional states – mainly through trade – that their economic and reputational interests are better served by cooperating with international frameworks and strengthening domestic gold policies.
- Longer-term, following a sustainable cessation of hostilities, regional partners should work with Sudanese authorities (at national and subnational levels) towards the development of a responsible, sustainable gold sector, which will be critical for the reconstruction of the country. This will include legal and licit trade channels through neighbouring countries and the wider region, particularly Egypt and the UAE, to curb smuggling, enhance the livelihoods of civilians working in artisanal mining, and support the growth of conflict-free gold markets.

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# 01

# Introduction

**While gold has undoubtedly perpetuated violence and political instability in Sudan's civil war, this commodity also provides a way of understanding and mapping the complexities and regional drivers of this conflict.**

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The parties to Sudan's devastating civil war continue to compete for control over gold-mining assets and distribution channels to fund their efforts and reinforce power in areas they control. The use of this commodity links the conflict to an extensive and evolving transnational network that fuels violence and political instability in the region. But gold may also provide a way to understand and map these connections and demonstrate where engagement by the international community can be most effective.

Gold has long been a conflict commodity in Sudan,<sup>1</sup> enmeshed in subnational and national political contestations, and was an important factor in the two largest acts of mass violence in Sudan's recent history: the October 2021 coup and the ongoing civil war since April 2023. Prior to the 2021 coup, the country had been in a transitional period after the 2019 overthrow of the government of Omar al-Bashir, who had been in power for three decades. During this transitional period, the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF), both branches of Sudan's regular military and ostensibly allies in the ruling Transitional Sovereignty Council, were increasingly competing for control over the state's economic resources, including gold. Their intensifying rivalry ultimately led to war.

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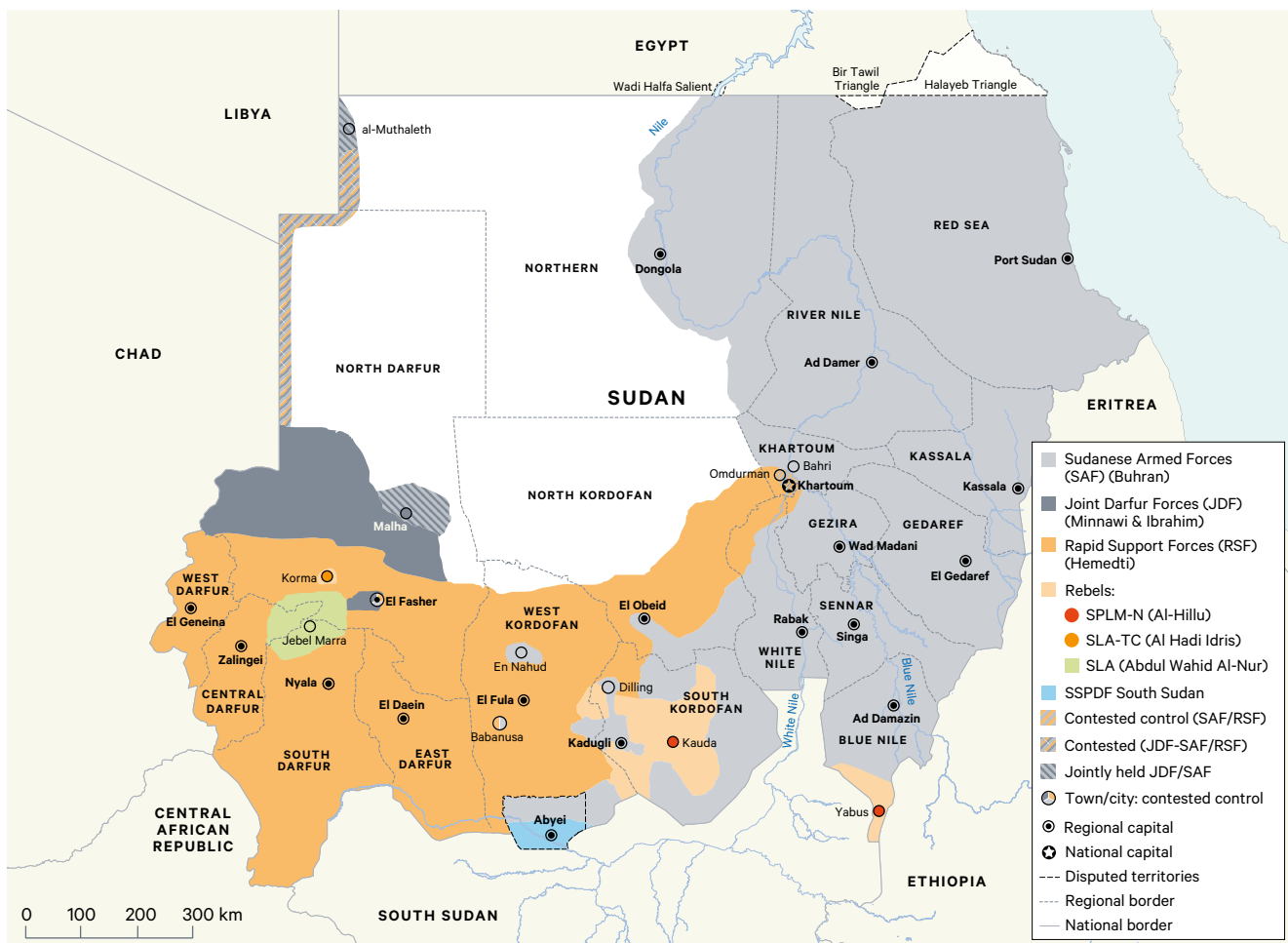
<sup>1</sup> Global Witness suggests that conflict resources should be defined as 'natural resources whose systematic exploitation and trade in a context of conflict contribute to, benefit from or result in the commission of serious violations of human rights, violations of international humanitarian law or violations amounting to crimes under international law.' Le Billon, sees 'conflict commodities' as not only resources that finance hostilities, but also as goods that shape 'the motives of violence and behaviour of armed groups'. See Global Witness (2006), *The Sinews of War – Eliminating the Trade in Conflict Resources*, Washington DC: Global Witness, [https://cdn-globalwitness-production-2.s3.amazonaws.com/archive/files/import/the\\_sinews\\_of\\_war.pdf](https://cdn-globalwitness-production-2.s3.amazonaws.com/archive/files/import/the_sinews_of_war.pdf); Le Billon, P. (2008), 'Diamond Wars? Conflict Diamonds and Geographies of Resource Wars', *Annals of the Association of American Geographers*, 98(2), pp. 345–372, <https://doi.org/10.1080/00045600801922422>; Cooper, N. (2001), 'Conflict goods: The challenges for peacekeeping and conflict prevention', *International Peacekeeping*, 8(3), pp. 21–38, <https://doi.org/10.1080/13533310108413906>.

## Gold and the war in Sudan

How regional solutions can support an end to conflict

Control over Sudan's gold sector – mining and production, as well as distribution and smuggling – is shaping the outcome of the civil war. The billion-dollar gold trade provides the most significant source of income for the two main conflict parties and feeds an associated cross-border network of actors that includes other armed groups, producers, traders, smugglers and external governments. Weapons and other commodities, such as fuel and food supplies, purchased with proceeds from gold have led to an increasingly destructive stalemate, with the RSF recently losing ground, including in the capital Khartoum, but neither side currently capable of fully defeating the other. As such, continued war is fragmenting Sudan and further militarizing the population, creating a de facto subnational divide, consisting of a largely SAF-controlled east and RSF-dominated west (see Figure 1).

**Figure 1.** Armed actor territorial control in Sudan, March 2025



Source: Based on map produced by Thomas van Linge, <https://x.com/ThomasVLinge/status/1896244871641670034>.

Note: The production of this map is intended to show the general areas of control by key conflict parties, recognizing that there are significant limitations with accurately depicting contested areas and that the situation on the ground is rapidly changing. The map does not infer acceptance by Chatham House of the depicted areas of territorial control. SPLM-N = Sudan People's Liberation Movement-North; SLA = Sudan Liberation Movement/Army; SLA-TC = Sudan Liberation Movement/Army-Transitional Council; SSPDF = South Sudan People's Defence Forces.

At the time of writing, the SAF has maintained control in River Nile and Northern states, the three states in eastern Sudan (Gedaref, Kassala, and Red Sea), and until recently held much of the contested Gezira, White Nile, and Sennar states in central Sudan, as well as part of Blue Nile state. The RSF remains in firm control of the five

states of Greater Darfur, except for El Fasher, capital of North Darfur, which it has held under siege since April 2024. Through an offensive that started in autumn 2024, the SAF recaptured significant territory in central Sudan including Wad Madani, capital of Gezira, in January 2025, and other parts of Gezira and Sennar states. The SAF has also sought to consolidate control over Khartoum, having largely removed the RSF from Omdurman, Bahri and areas along the eastern bank of the Blue Nile River.<sup>2</sup> Both the SAF and the RSF also have armed groups allied to them that hold territory in parts of the country, such as the SAF-aligned Joint Darfur Forces (JDF) in North Darfur, or the recently RSF-associated Sudan People's Liberation Movement-North (SPLM-N) led by Abdelaziz al-Hilu in South Kordofan and Blue Nile.

## **Sudan's conflict gold is deeply intertwined with the wider region. The civil war has, to varying degrees, impacted Sudan's seven neighbouring countries, and been influenced by them and regional powers further afield.**

Sudan's conflict gold is also deeply intertwined with the wider region. The civil war has, to varying degrees, impacted Sudan's seven neighbouring countries, and been influenced by them and regional powers further afield. For example, the SAF accrues rents not only through taxing exports and imports transiting Port Sudan, but also by receiving support from foreign governments such as Egypt, Qatar and Türkiye, including via the sale of strategic commodities such as gold. In its effort to control the supply chain of gold, the RSF has extended its economic operations beyond Sudan's borders, selling primarily to the United Arab Emirates (UAE), which has consequently become a key backer. The spillover effects of the war into neighbouring countries such as Chad, Egypt, Libya and South Sudan, have included the displacement of millions of refugees, and the smuggling of gold across Sudan's porous borders – some of which has facilitated the import of fuel, military supplies and mining inputs (such as equipment and chemicals). Such economic processes not only connect Sudan to the neighbouring region, but they facilitate the supply chains that fuel and sustain the conflict.<sup>3</sup>

This paper argues that Sudan's war should be analysed as part of a transnational or regional conflict ecosystem, which consists of 'multiple overlapping and intersecting networks of power and authority'.<sup>4</sup> Actors within these networks, such as armed groups or national governments, compete for 'ideological, military,

<sup>2</sup> The capital of Sudan is a tripartite metropolis consisting of three cities that form the capital – Khartoum, Omdurman and Khartoum North or Bahri. These cities are divided by the natural borders of the confluence of the Blue Nile and the White Nile.

<sup>3</sup> Mansour, R. and Soliman, A. (2024), 'How a transnational approach can better manage the conflict in Sudan', Chatham House Expert Comment, 3 January 2024, <https://www.chathamhouse.org/2023/12/how-transnational-approach-can-better-manage-conflict-sudan>.

<sup>4</sup> Mansour, R. (2024), 'Introduction: The Transnational Conflict Ecosystem', in Mansour, R. (ed.) (2024), *Borders of Conflict: Navigating Policy in a Transnational Ecosystem*, Durham: Global Policy, [https://www.globalpolicyjournal.com/sites/default/files/pdf/XCEPT%20-%20Borders%20Conflicts%20%28PDF%29\\_1.pdf](https://www.globalpolicyjournal.com/sites/default/files/pdf/XCEPT%20-%20Borders%20Conflicts%20%28PDF%29_1.pdf); Mann, M. (1986), *The Sources of Social Power, Volume I: A History from the Beginning to 1760 AD*, Cambridge: Cambridge University Press.

economic and political authority,<sup>5</sup> and extend their influence beyond the nation state. The gold sector, although overtly economic, is closely linked to the contested authority between the SAF and the RSF, and intersects with political, security and ideological networks. Moreover, these interconnected networks are cross-border and challenge traditional binary hierarchical structures, such as state versus non-state, formal versus informal, and licit versus illicit.<sup>6</sup>

In pursuit of their own interests, the Gulf states, notably the UAE and Saudi Arabia, as well as other regional powers, such as Egypt, have had a significant influence on Sudan's conflict, through support to one or other warring party. It is increasingly clear that these regional states' long-term strategic interests – in Sudan and the broader Horn of Africa and Red Sea region – are in part shaped by economic drivers. Sudan's lucrative gold sector is also interconnected with flows of other commodities (such as fuel, land, agricultural products and livestock) and broader geostrategic relations. Saudi Arabia and the UAE have made multi-billion-dollar agricultural investments in Sudan to secure food for their populations. Safeguarding these investments, including long-term food security for their citizens, has driven both countries to intervene in Sudan's conflict. The UAE seems to be fully backing the RSF, and Saudi Arabia has had a more prominent role in mediation efforts, while tacitly supporting the SAF-controlled authorities.

Sudan's conflict responds to, and is exacerbated by, the broader regional context, which is in turn shaped by the contestation between Saudi Arabia and the UAE over regional hegemony and Red Sea dominance. The UAE's interventions in Sudan are informed by its desire to become a middle power and global logistics and financial hub, including for high-value commodities such as gold and fuel. These interventions are emerging in an increasingly multipolar world order defined by multi-alignment, evolving spheres of influence and declining US hegemony. Consequently, the fluid alliances and interests of regional states involved in the war makes the search for a viable ceasefire and political settlement more difficult to navigate. Such complex interactions between economic, security, geopolitical and ideological networks form part of Sudan's regional conflict ecosystem and are another reason why Sudan's gold matters as a source of conflict.

## About this paper

This research paper outlines the ways in which Sudan's gold sector intersects with both internal and external conflict dynamics, and how it forms a central component of a transnational conflict ecosystem that is worsening Sudan's civil war. The paper first examines the role of gold within Sudan's war, the history of attempts by state security and other armed actors to control the sector, and how economic competition, including over gold, was a triggering factor in the current war. It then analyses the gold sector in SAF-controlled areas – in particular, how the de facto authorities have sought to redirect the gold trade through Egypt – and then examines the gold sector in RSF-controlled areas, including in the group's

<sup>5</sup> Mansour (2024), *Borders of Conflict*.

<sup>6</sup> Goodhand, J. and Pain, A. (2021), 'Entangled lives: drug assemblages in Afghanistan's Badakhshan', *Third World Quarterly*, 43(11), pp. 2654–73, <https://doi.org/10.1080/01436597.2021.2002139>.

Darfur heartlands, as well as the ways the commodity trade connects to actors across the borders with Chad, Libya and South Sudan. The paper then looks at how these dynamics fit into a regional conflict ecosystem through ‘inside-out’ and ‘outside-in’ mechanisms, and how Sudan’s gold both impacts its neighbours, notably in Egypt and the UAE, and shapes regional policy towards Sudan.

The paper concludes by offering recommendations for effective and sustainable policy and programmatic interventions to address the war in Sudan, given the need to navigate the broader ecosystem in which the conflict operates. Some recommendations are aimed at policymakers in regional states, including the UAE and Egypt, while others are for international partners seeking to restore peace in Sudan and the broader region. The latter include the UK, the US and the EU, along with like-minded states and multilateral bodies such as the African Union (AU), the Intergovernmental Authority on Development (IGAD) and the UN.

## **Methodology**

Field research for this paper was conducted in Sudan and neighbouring countries between 2021 and 2024. In Sudan, field data was collected in Khartoum, North Darfur, Gedaref and Kassala states. Primary data collection was carried out in Kufra, southern Libya, Egypt and Ethiopia. The bulk of field research consisted of over 30 semi-structured key informant interviews, both in person and by phone. This was supplemented by data from two workshops: the first, on Sudan’s war economy, was organized by Chatham House and C4ADS in August 2024. The second workshop, on conflict trends in eastern Sudan and regional implications, was organized by the Cross-Border Conflict Evidence, Policy and Trends (XCEPT) project and held in Nairobi in November 2024. Desk-based research examined a variety of secondary sources, including academic and policy research on local and regional dynamics, official documentation, trade data, and news sources from Sudanese and international outlets.

The sampling for the key informant interviews sought to represent a broad range of actors and interests engaged in the political economy of Sudan and the gold sector specifically. This included government officials (at national and local levels), armed actors, regional and international diplomatic actors, academics, policy analysts, businesspeople, gold traders and civil society representatives. A limitation of the study, due to restrictions on time and resources, was not conducting research in other parts of the broader region, such as Chad, Eritrea, South Sudan, or the Arabian Gulf.

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# 02

# The securitization of Sudan's gold sector

**Sudan's kleptocratic elite have sought to control gold for wealth and patronage, at the same time competition between the SAF and the RSF over gold has driven and sustained the civil war.**

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Before looking at the ways in which gold has linked Sudan's war to the wider region, it is first necessary to understand Sudan's gold sector and the changing role that the commodity has played in the country's political economy. The military has controlled Sudan for all but 13 of its 69 years of independence. Both the SAF and, more recently, the RSF have benefited from the long-term conflation of security and commercial interests in Sudan, with the emergence over 30 years of a military-industrial complex that controls most of Sudan's economy, including the gold sector, and diverts resources away from the national budget and state institutions.

## Existing gold production in Sudan

Three primary modes of production dominate gold extraction in Sudan: artisanal small-scale gold mining (ASGM), processing of gold tailings and large-scale industrial mining.<sup>7</sup> A significant amount of Sudan's gold production is not captured in official statistics, with the figures released indicative of what the authorities wish to be made public in any given year. This often results in significant variances in the

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<sup>7</sup> Production figures cited in this paper are given in metric tonnes (1 tonne equals 1,000 kg). Some figures have been altered from their original unit of weight citation to be reflected in metric tonnes. Official Sudanese government production figures are cited in metric tonnes.

production and export figures cited by different government bodies, including the Sudanese Mineral Resources Company (SMRC) and the Central Bank of Sudan.<sup>8</sup>

The largest contributor is ASGM, which accounted for 53.71 tonnes – or 83 per cent – of the total declared gold production of 64.36 tonnes in 2024.<sup>9</sup> Artisanal miners rely on inefficient traditional methods that extract a maximum of 30 per cent of the gold from ore, leaving a significant portion of gold and mercury particles in the residue, known as tailings. More than a million Sudanese are involved in ASGM in large open-air mining zones across 12 of Sudan’s 18 federal states.

The second mode of production is the processing of gold tailings, locally known as *karta*, using semi-mechanized techniques, primarily employing cyanide, to attempt to extract the remaining gold. This approach – which includes methods such as closed cyanide circuits, heap leaching and immersion in open-air ponds – produced 4.95 tonnes of gold, or 7 per cent of Sudan’s total declared production, in 2024.<sup>10</sup>

Large-scale industrial mining ostensibly represents the third mode, accounting for 5.70 tonnes of gold, or nearly 9 per cent of the total production in 2024.<sup>11</sup> This is led by franchise companies licensed to explore vast concessions, often hundreds of thousands of square kilometres in size. These companies are expected to use advanced geological mapping, remote sensing and advanced extraction techniques to gradually modernize and industrialize Sudan’s gold production. By 2020, there were 144 franchise companies operating in Sudan: 56 per cent were Sudanese, 29 per cent foreign, and 15 per cent jointly owned. Of these, 131 were in the exploration phase, four inactive, and nine in production.<sup>12</sup>

However, many franchise companies have failed to fulfil their contractual obligations to develop industrial mining operations. Instead, several have shifted their focus to large-scale processing of artisanal tailings, effectively functioning as tailings-processing companies rather than industrial miners. Some franchise companies directly contract artisanal miners within their licensed blocks to supply ore to their processing facilities. Others, including most Sudanese-owned companies and Meroe Gold – a company linked to M-Invest,<sup>13</sup> the investment

<sup>8</sup> Production that is not captured includes gold in the artisanal sector, which historically has accounted for up to 80 per cent of production; as well as gold smuggled or traded off the books by security, political and business elites. Since 2023, official figures do not account for gold produced in RSF-held areas.

<sup>9</sup> The 2024 production figures cited in this section, from the Sudanese Mineral Resources Company (SMRC), are the latest official figures covering gold production in SAF-controlled states. ASGM includes both ‘traditional’ and ‘small-scale’ mining. By comparison, the last available figures were for 2021, with ASGM accounting for 32.73 tonnes – or 66 per cent – of the total declared gold production of 49.70 tonnes. See Sudanese Mineral Resources Company (2024), *SMRC 2024 Achievements*, Sudan: Ministry of Minerals, hard copy on file; also Sudanese Mineral Resources Company (2021), *The Annual report for 2021 of the Ministry of Minerals*, Sudan: Ministry of Minerals, hard copy on file.

<sup>10</sup> By comparison, the processing of gold tailings produced 9.85 tonnes of gold, or 20 per cent of Sudan’s total declared production in 2021. *Ibid.*

<sup>11</sup> Large-scale industrial mining accounted for 7.12 tonnes of gold, or 14 per cent of the total production in 2021. *Ibid.*

<sup>12</sup> Sudanese Mineral Resources Company (2020), *The Annual Report for 2020 of the Ministry of Minerals*, Sudan: Ministry of Minerals, p. 15, hard copy on file.

<sup>13</sup> The Bell (2018), ‘“Putin’s Cook” set out to mine gold in Africa’, 5 June 2018, <https://thebell.io/en/putin-s-cook-set-out-to-mine-gold-in-africa>.

arm of the erstwhile Wagner Group and its successor Russia's Africa Corps – send brokers to purchase tailings from artisanal miners and wet mill owners in gold markets and artisanal mining zones.<sup>14</sup>

This shift from industrial mining to tailings processing highlights systemic challenges within Sudan's gold industry. Weak regulatory enforcement has enabled franchise companies to prioritize low-cost, high-profit tailings processing over long-term investments in industrial mining growth, undermining the sector's potential for sustainable development and opening the door for corruption.<sup>15</sup>

## Tamkeen and the primacy of gold after 2011

During the Bashir era (1989–2019), military and security elites colluded with the ruling National Congress Party (NCP) to capture state assets. Political and economic power was built on a policy of *Tamkeen* (Arabic for empowerment),<sup>16</sup> a state policy where regime loyalists established control over corporate assets across key sectors of Sudan's economy to enrich its ruling party members and maintain power. In exchange for their loyalty, senior SAF officers, especially those considered to be Islamist and from favoured ethnic groups, were given economic privileges in state-owned enterprises (SOEs) and retired officers were given access to land and directorships.

The Bashir regime exploited revenues from Sudan's booming oil sector to build up a centralized network of patronage, mainly benefiting the security sector and the NCP, which was the political arm of Sudan's Islamist movement, the real power behind the Bashir regime. However, South Sudan's secession in 2011 resulted in the loss of two-thirds of Sudan's oil revenue, which spurred a boom in gold mining, reinforced by the dramatic rise in international gold prices during the 2000s.<sup>17</sup>

Growth in the gold sector from 2012 changed the nature of Sudan's political economy, as gold quickly took the place of oil as the main source of Sudan's foreign currency.<sup>18</sup> In contrast to oil, which was controlled by the government from production to export,<sup>19</sup> the artisanal nature of the gold industry posed significant challenges for government regulation – as ASGM accounted for as much as 80 per cent of production.<sup>20</sup> To assert its dominance over

<sup>14</sup> Additionally, some companies process gold tailings from large, abandoned heaps left behind by defunct mining operations. The pricing of tailings is determined by truckload units, with prices varying based on sample analyses that assess gold particle content. Field research finding, Abaidia, River Nile state, August 2022.

<sup>15</sup> Africa Intelligence (2019), 'GPB Global Resources taps into ASM mining network to unearth gold', 26 November 2019, [https://www.africaintelligence.com/mining-sector\\_exploration-production/2019/11/26/gpb-global-resources-taps-into-asm-mining-network-to-unearth-gold,108383406-art](https://www.africaintelligence.com/mining-sector_exploration-production/2019/11/26/gpb-global-resources-taps-into-asm-mining-network-to-unearth-gold,108383406-art).

<sup>16</sup> Khalid, M. (2003), *War and Peace in Sudan: A tale of two countries*, Milton Park: Routledge.

<sup>17</sup> Domitrovic, B. (2023), 'Gold Has Been an Excellent Barometer In The 2000s', Forbes, 9 December 2023, <https://www.forbes.com/sites/briandomitrovic/2023/12/09/gold-has-been-an-excellent-barometer-in-the-2000s>.

<sup>18</sup> Chevillon-Guibert, R., Ille, E. and Salah, M. (2020), 'Power practices, mining conflicts and the gold economy in the Sudan under the Al-Inqaz regime', *African Politics*, 158(2), pp. 123–148, <https://shs.cairn.info/journal-politique-africaine-2020-2-page-123?lang=en>.

<sup>19</sup> Including controlling production fields, transport pipelines, refineries, distribution of refined products, and export trade to the global market.

<sup>20</sup> Soliman, A. (2019), *Sudan Stakeholder Dialogues Options for Economic Stabilization, Recovery and Inclusive Growth*, Briefing Note, London: Royal Institute of International Affairs, <https://www.chathamhouse.org/2019/10/sudan-stakeholder-dialogues/economic-recovery-developing-mid-long-term-strategies>.

gold-producing areas of the country, the Bashir regime used violence and coercion, enforced by a plethora of security agencies and armed groups, which subsequently became involved in gold.<sup>21</sup>

The inability, or rather the unwillingness, of the state to oversee the gold sector led violent actors to prevail. This dominance of violent actors has its roots in the state's use of armed actors to extract natural resources from peripheral areas in the country.<sup>22</sup> During the colonial period, the rampant violence against local communities benefited the colonial power. The practice continued in post-independent Sudan and is still prevalent today, with Sudan's regular and auxiliary forces benefiting the most from the sector thanks to the entitlements that the Bashir kleptocratic system granted to uniformed forces.

During the three decades of the Islamist regime of Omar al-Bashir (1989–2019), the regime awarded gold mining concessions to state security and defence agencies, including paramilitary groups and former armed movements loyal to the regime.<sup>23</sup> The government tolerated large-scale gold mining and trading operations involving loyalist ethnic militias, such as the Desert Shield militia of the Kebabish tribe, based in North Kordofan state. The regime also allowed the SAF, the National Intelligence and Security Service (NISS), and the RSF to engage in unofficial gold export activities through their respective companies, which are nominally state-owned in the case of the SAF, and privately-owned by the commanders of the RSF. The latter used their security and political power to grow the wealth of their clan.<sup>24</sup>

At the local level, the involvement of national defence and law enforcement agencies in the gold-mining sector made it difficult for the state to maintain the rule of law. Independent reporting and several court cases demonstrated the impunity of the NISS, the SAF and the RSF for involvement in gold-smuggling operations. A policy of allowing armed actors free rein in the gold sector was integral to the regime's survival strategy of economically empowering the security forces and paramilitary bodies that defended it against rural insurgencies and urban uprisings in northern and central Sudan. It is estimated that before the current civil war 50–80 per cent of the country's gold was smuggled, rather than

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<sup>21</sup> These include the SAF, the National Intelligence and Security Services (NISS), and its successor as of 2019 the General Intelligence Service (GIS), the Popular Defence Forces (PDF), the Central Reserve Police, and the Mining Police. Most notably, the RSF commanders have substantially increased their economic and political power through the control of gold mines in Darfur.

<sup>22</sup> Non-state armed actors involved in the gold sector include the Darfur armed movements, the Sudan People Liberation Movement-North (SPLM-N), independent tribal militias, and foreign private military companies such as the Russian Wagner Group and its successor Africa Corps. Among the perpetrators of violence are residual forces of the Sudan People's Liberation Movement in Opposition (SPLM-IO) led by Riek Machar, who remained in Abu Gebeiha in South Kordofan as a reserve force after Machar's return to South Sudan.

<sup>23</sup> Abdelrahman, M. S. (2023), *Sudan's Other War: The Place of Gold*, New Jersey: Sudan Transparency and Policy Tracker, <https://sudantransparency.org/wp-content/uploads/2023/07/GoldandWarFINAL.pdf>.

<sup>24</sup> The RSF is a paramilitary force led by General Mohamed Hamdan Dagalo, aka Hemedti, a former camel trader turned armed group leader. Hemedti and his family belong to the Mahariya branch of the Rizeigat, an Arab nomadic tribe from which much of the RSF's leadership is drawn. The Rizeigat belong to the greater Baggara Arab fraternity of Darfur and Chad. The RSF is a family dominated military and economic entity, with Hemedti's brothers hugely influential. Abdelrahim Dagalo is the second in command and leader of the ground forces, while Algony Dagalo oversees the RSF's overseas economic portfolio and is increasingly asserting himself as a public figurehead. See Africa Intelligence (2023), 'Hemeti's youngest brother emerges from shadows in bid for RSF prominence', 17 November 2023, <https://www.africaintelligence.com/eastern-africa-and-the-horn/2023/11/17/hemeti-s-youngest-brother-emerges-from-shadows-in-bid-for-rsf-prominence,110098791-eve>.

exported through official procedures and channels,<sup>25</sup> with Khartoum International Airport a key hub, particularly via a VIP lounge that seems to have enabled senior officials to abuse their influence to transport gold abroad.<sup>26</sup>

## Economic competition triggers the war

Both the RSF and the SAF used their security and political influence during and after Bashir's rule to consolidate and expand their footholds in gold extraction and trade. Both also drew resources from links to foreign companies, particularly in Russia and the UAE, with which they had prior ties.

As a result, the reform-minded government led by Prime Minister Abdalla Hamdok (2019–2021), which replaced the Bashir government in mid-2019, was unable to dismantle the Bashir-era *Tamkeen* system. The Hamdok government set up the Empowerment Removal Committee<sup>27</sup> to recover stolen assets and carry out macroeconomic reforms, such as exchange rate unification,<sup>28</sup> requiring SOEs – including companies linked to the military – to be subject to independent audits. It also pushed for all SOEs to be brought under the oversight of the Ministry of Finance and Economic Planning (including in the gold sector).<sup>29</sup> This threatened the economic power of the security agencies and former Bashir elites, and was a major factor in the October 2021 coup that saw military actors led by General Abdel Fattah al-Burhan overthrow the Hamdok government.

## Economic competition between the SAF and the RSF in gold mining and trade was a leading driver of the current war.

Economic competition between the SAF and the RSF in gold mining and trade was also a leading driver of the current war. During Bashir's reign, the regime was able to moderate rivalry between them, sharing lucrative opportunities for partnership with external investors between the two forces to keep each in check. The regime allowed RSF commanders' privately-owned companies to develop partnerships with foreign companies, while also offering lucrative deals to SAF-controlled companies, including with Russian-controlled subsidiaries of the Wagner Group.

<sup>25</sup> Dabanga Sudan (2022), 'Gold remains Sudan's largest export commodity', 11 September 2022, <https://www.dabangasudan.org/en/all-news/article/gold-remains-sudan-s-largest-export-commodity>.

<sup>26</sup> Major General Bashir Al-Tahir, the national director of the Customs Authority in 2019, acknowledged the issue, stating that 'the airport in its current form contributes greatly to gold smuggling', with large quantities of gold already seized. He also highlighted the involvement of regime officials in facilitating smuggling through the airport. Both interviews were for The Independent Arabia. Ali, I. M. (2019), "تهريب الذهب... ثقب ينخر جسد الاقتصاد", The Independent Arabia, 16 October 2019, <https://www.independentarabia.com/node/64381/>. اقتصاد/الاقتصاد-العربي/تهريب-الذهب-ثقب-ينخر-جسد-الاقتصاد-السوداني.

<sup>27</sup> The Hamdok government set up the Committee for Dismantling the June 30, 1989 Regime, Removal of Empowerment and Corruption and Recovery of Public Funds, known as the Empowerment Removal Committee. This committee sought to dismantle the *Tamkeen* system and confiscated a number of companies, land and other assets corruptly acquired by members of the former regime and their collaborators.

<sup>28</sup> Away from the previous system of multi-official rates that benefited the security agencies.

<sup>29</sup> Remarks made by senior member of Sudan's Transitional Government (2019–2021), Chatham House workshop on Sudan's war and reconstruction, 5–9 December 2023.

For instance, the Mining Ministry awarded Sudan Master Technology, in partnership with the government, a gold exploration licence at Block 3A in Red Sea state in 2012. Sudan Master Technology had a 70 per cent stake and the government held the remainder. As a company of the army-controlled Defense Industries System (DIS), Sudan Master Technology enjoys broad exemptions from taxes, customs and laws regulating government procurement, contracting and public audit requirements.<sup>30</sup> In 2018, Bashir instructed the Mining Ministry to award the government's 30 per cent share in Block 3A to Meroe Gold, a Sudanese subsidiary of M-Invest, the investment arm in Sudan of Russia's Wagner network. The US placed both Meroe Gold and its parent company, M-Invest, under sanctions in July 2020 and the EU and UK followed suit in 2023.<sup>31</sup>

Similarly, a 2022 investigation by the Organized Crime and Corruption Reporting Project documented agreements between Aswar – the holding company under the DIS umbrella, operated by the SAF's military intelligence – and M-Invest to facilitate Wagner Group's operations in Sudan. These agreements involved payments of millions of dollars for services such as visa processing, weapon supplies and the organization of flights using Sudanese military planes, with military signal codes to land on military air bases.<sup>32</sup>

After the 2021 coup, growing political competition between the RSF and the SAF was mirrored by economic competition, particularly in the gold sector. International media attention on the gold businesses of the RSF commanders led to covert investment agreements with several large privately-owned processing companies<sup>33</sup> and the rapid expansion of RSF holdings in gold production and trade. This alarmed SAF commanders, who felt the need to ramp up and expand their own production, resulting in their agreement for the direct processing of gold through the use of cyanide in at least two SAF divisional headquarters.<sup>34</sup>

In incidents documented by environmental activists and the local media, the SAF divisional headquarters in Atbara in River Nile state and Dardeib in Red Sea state leased part of their military areas to local entrepreneurs to produce gold through cyanide leaching in open air ponds. The serious environmental and health risks that this posed led to protests and claims that the SAF had issued

<sup>30</sup> Suliman, M. (2021), 'منظومة الصناعات الدفاعية: إني أخذت ما أعطيت شي', [The Defense Industries System: I Took and Gave Nothing in Return!], Al Democratia Newspaper, 12 January 2021, <https://www.democratsudan.com/-منظومة-الصناعات-الدفاعية-إني-أخذت-م>.

<sup>31</sup> US Department of the Treasury (2025), 'Treasury Targets Financier's Illicit Sanctions Evasion Activity', press release, 15 July 2020, <https://home.treasury.gov/news/press-releases/sm1058>. See also Council of the European Union (2023), 'Wagner Group: Council adds 11 individuals and 7 entities to EU sanctions lists', press release, 25 February 2023, <https://www.consilium.europa.eu/en/press/press-releases/2023/02/25/wagner-group-council-adds-11-individuals-and-7-entities-to-eu-sanctions-lists>; Foreign, Commonwealth & Development Office (2023), 'UK sanctions Wagner Group leaders and front companies responsible for violence and instability across Africa', press release, 20 July 2023, <https://www.gov.uk/government/news/uk-sanctions-wagner-group-leaders-and-front-companies-responsible-for-violence-and-instability-across-africa>.

<sup>32</sup> In return, Aswar received substantial financial benefits, including a \$200,000 'goodwill fee', \$100,000 per month, and coverage of its taxes and employee salaries by M Invest. See Sharife, K. et al. (2022), 'Documents Reveal Wagner's Golden Ties to Sudanese Military Companies', *Organized Crime and Corruption Reporting Project*, 2 November 2022, <https://www.occrp.org/en/investigation/documents-reveal-wagners-golden-ties-to-sudanese-military-companies>.

<sup>33</sup> Authors' interviews with local sources, under the condition of anonymity, January 2021, Khartoum.

<sup>34</sup> Gold cyanidation is the process of extracting gold from ore through a 'leaching' step during which the gold is dissolved in an aqueous medium, followed by the separation of the gold bearing solution from the residues. European Parliament Committee on the Environment, Public Health and Food Safety Secretariat (2013), *Background Note on Cyanide in Gold Mining*, Brussels: European Parliament, [https://www.europarl.europa.eu/meetdocs/2009\\_2014/documents/envi/dv/envi20130925\\_info-cyanide\\_/envi20130925\\_info-cyanide\\_en.pdf](https://www.europarl.europa.eu/meetdocs/2009_2014/documents/envi/dv/envi20130925_info-cyanide_/envi20130925_info-cyanide_en.pdf).

40 licences for 60 cyanidation basins, reflecting underlying concerns among SAF leaders about the RSF's rapid expansion in the sector,<sup>35</sup> at a time when both forces were still ostensibly allied in protecting the Bashir regime and resisting Sudan's democratization efforts following Bashir's fall.

This covert rivalry extended to other sectors of the economy, such as agriculture and livestock trade, and the banking sector, creating economic competition that further strained relations between the two forces.<sup>36</sup> Ultimately, these tensions laid the groundwork for the military confrontation that began on 15 April 2023.

## The scramble for gold following the outbreak of war

Sudan's civil war is driven by competition for power and resources between the SAF, led by General Burhan, and the RSF, led by General Mohamed Hamdan Dagalo (known as Hemedti). The two generals worked together during the transition, including to overthrow the civilian government of former Prime Minister Abdalla Hamdok, but then turned against each other after the coup. Both want to retain their political power, preserve their multi-billion-dollar business empires and avoid democratic reforms in Sudan that could lead to a representative civilian government, which would likely see the RSF and the SAF leaders face prosecution and proper accountability.<sup>37</sup>

The SAF asserts itself as the de facto state actor through the Transitional Sovereignty Council, which it took over after the military coup against the legitimate civilian government in October 2021, and through its control of the remnants of state institutions. The operations of these have mostly been transferred from Khartoum to Port Sudan on the Red Sea.<sup>38</sup> The SAF-controlled de facto authorities are subsequently referred to in this paper as the Port Sudan authorities. The SAF's domestic arms production was insufficient to prosecute the war, and was further aggravated by the RSF's seizure of the SAF's largest weapon manufacturing factories in the first weeks of the conflict, which forced the SAF to seek arms from China, Iran, Russia, Türkiye and elsewhere.

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<sup>35</sup> The Coalition Of Demand-Based Organizations (2022), 'تجمع الأقسام المطالبة [The catastrophe of cyanidation that the Artillery Division in Atbara is protecting]', Khartoum: The Coalition Of Demand-Based Organizations, received in PDF format, copy on file. See also: Africa Defense Forum (2023), 'Protesters Demand That Sudan Armed Forces Stop Gold Mining, Clean Up Polluted Sites', 14 March 2023, <https://adf-magazine.com/2023/03/protesters-demand-that-sudan-armed-forces-stop-gold-mining-clean-up-polluted-sites>.

<sup>36</sup> Sudan Transparency And Policy Tracker and Facts Sudan (2024), *How Sudan's Warring Parties Exploit the Livestock Sector*, November 2024, available at: Sudan Transparency and Policy Tracker, <https://sudantransparency.org/wp-content/uploads/2024/11/LivestockEN2.pdf>.

<sup>37</sup> Mailey, J. R. (2024), *The War of Thieves: Illicit Networks, Commoditized Violence and the Arc of State Collapse in Sudan*, Geneva: Global Initiative Against Transnational Organised Crime, <https://globalinitiative.net/wp-content/uploads/2024/02/JR-Mailey-The-war-of-thieves.-Illicit-networks-commoditized-violence-and-the-arc-of-state-collapse-in-Sudan-GI-TOC-February-2024.pdf>.

<sup>38</sup> The SAF-controlled de facto authorities claim to be the sovereign representative of Sudan. This is contested due to their responsibility for overthrowing the legitimate civilian government headed by Prime Minister Dr Abdalla Hamdok on 25 October 2021, as well as their role in propagating war in Sudan since 15 April 2023. The African Union Peace and Security Council suspended the participation of the Republic of Sudan in all AU activities on the 6 June 2019, until an effective civilian-led Transitional Authority was re-established.

New weapon supplies are financed by a complex network of SAF-aligned companies and Islamist and former regime-controlled business networks. The Port Sudan authorities continue to exploit gold produced in the areas that they control and have actively sought to expand production. The SAF also benefits from taxation of gold production, which is overseen by the Ministry of Finance.<sup>39</sup>

For its part, the RSF moved quickly to consolidate its control over gold-producing areas in Darfur and Kordofan and critical infrastructure that would support its war effort. In the first two months it captured both the currency printing house and the Sudan Gold Refinery in Khartoum, which held an estimated 1.3 tonnes of unrefined gold with a value estimated at \$150 million ready for export.<sup>40</sup> The RSF also raided banks and private houses for cash and gold.<sup>41</sup> This gold and other looted valuables, such as private vehicles, were transported west to Darfur and across Sudanese borders into Chad. Moreover, the RSF also quickly retook control of Jebel Amer, once a significant gold-producing area in North Darfur and has since consolidated other gold-producing areas across the Darfur region, thus acquiring the ability to finance weapon and logistical purchases.<sup>42</sup>

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<sup>39</sup> Sudan Transparency And Policy Tracker (2024), *On the Road to War: The Role of Illicit Financial Flows (IFFs) in Sudan*, August 2024, p. 16, <https://sudantransparency.org/on-the-road-to-war-the-role-of-iffs-in-sudan>.

<sup>40</sup> Before the RSF captured it, the SAF had reportedly removed 2 tonnes of gold and a group within the SAF had resold it. Participant contribution, Chatham House workshop on Sudan's war economy, 14–15 August 2024.

<sup>41</sup> Many Sudanese, especially women, invest their money in gold jewellery for social events and as family savings, which they keep at home.

<sup>42</sup> Abdelrahman, M. S. (2023), *Sudan's Other War*.

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# 03

## Gold production and trade during the war

**All players in Sudan's civil war have sought to maintain and expand their control of gold assets and output. SAF areas are producing more, and gold is increasingly being smuggled across the borders to neighbouring countries.**

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The parties fighting in Sudan's civil war have sought to maintain and expand their control of gold production and trade. The war had the immediate impact of disrupting gold extraction and trade in both the SAF and the RSF's mining areas: due to the rapid deterioration of security conditions across Sudan, leading to the departure of foreign workers; the interruption of imports for processing, mainly mercury, cyanide and fuel; and price rises once imports were again available, due to the deterioration in value of the local currency and the higher costs of transport.

However, experiences of gold mining and trading have differed across RSF- and SAF-controlled zones. The war reinforced a de facto split in Sudan's gold-mining areas, with the SAF controlling mines in Red Sea, Northern, River Nile and South Kordofan states, and the RSF presiding over mining areas in Darfur and West Kordofan (see Figure 3). Well before the war, the SAF, NISS<sup>43</sup> and the RSF set up gold-trading companies, including SAF's Sudan Master Technology and its exploration subsidiary Red Rock Mining, NISS's Sabika Company, and RSF's Al-Junaid Company for Multi Activities and its subsidiary Al-Junaid Company for the Treatment of Mineral Waste.

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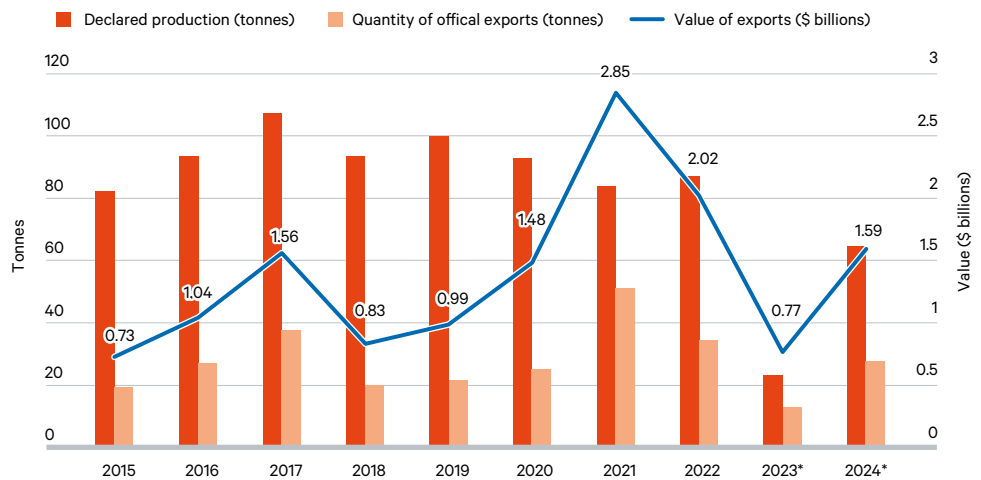
<sup>43</sup> The NISS was rebranded as the GIS in 2019. Sudan Tribune (2019), 'Sudan's military reforms security services', 29 July 2022, <https://sudantribune.com/article66001>.

The profits generated are being used to purchase arms and commodities that sustain the war efforts of the SAF, the RSF and their allies, while crucially also depleting Sudan’s wealth for future generations.

## SAF-controlled areas

The territorial divide created by the war has left Sudan’s largest gold-producing areas in the River Nile, Northern and Red Sea states in the hands of the SAF-controlled Port Sudan authorities. The three states are sparsely populated and have been historically free from armed conflict, which made them favourable sites for formal operations by treatment and franchise companies. In South and West Kordofan states, where ASGM is carried out by local miners on communal lands, companies face peaceful protests demanding an end to their encroachment on what the locals see as public property. At times, such protests have resulted in deadly repression by police, the NISS (later the General Intelligence Service) and the RSF, triggering the destruction and arson of company properties and factories.<sup>44</sup>

**Figure 2. Sudanese official gold production and exports (2015–24)**



Source: Central Bank of Sudan, ‘Foreign Trade Statistical Digest’, reports from 2016 to 2024; \*SMRC (2024), *SMRC 2024 Achievements*; ‘Chart on Gold Production, Exports & Value Gap from 2011-2022’ in Sudan Transparency And Policy Tracker (2024), *On the Road to War: The Role of Illicit Financial Flows (IFFs) in Sudan*, p. 8.

Figure 2 shows that Sudan’s official gold production was steadily above 80 tonnes before the war. However, gold output plunged at the start of the conflict, dropping to around 2 tonnes between April and August 2023, after five months of war.<sup>45</sup> This was in part due to shortages of inputs, and exacerbated by growing hostility

<sup>44</sup> Baldo, S. (2023), *Community Protests in Sudan’s Gold Mining Sector: Peaceful Resistance and Repressive Responses*, New Jersey: Sudan Transparency and Policy Tracker, <https://sudantransparency.org/wp-content/uploads/2023/02/CommunityProtestsEN.pdf>.

<sup>45</sup> The Sudan Times (2023), ‘Despite the war, Sudan produces two tons of gold, valued at \$124 million’, 14 September 2023, <https://thesudantimes.com/economy/despite-the-war-sudan-produces-2-tons-of-gold-worth-124-million>.

towards artisanal miners from western Sudan working in River Nile and Northern states, who were accused of being aligned with the RSF by local officials and propagandists due to their shared origins and ethnicity.

The urgent push for gold companies to resume production after the start of the war led to a violent clampdown by security forces on residents in the Delgo settlement in the Northern state. Mining in the area is being undertaken by Delgo Mining, a joint venture between the Sudanese government and Tahe Mining, a Turkish company.<sup>46</sup> Locals have complained about alleged serious environmental contamination risks that Delgo Mining's processing facility near the Nile River posed to their homes and farms.<sup>47</sup> But repeated judicial rulings ordering the company to stop operations have been ignored due to close business ties with members of the former Bashir regime that are still influential. In the latest incident, the governor of Northern state underscored the need to continue the work of the company under any condition to financially support the war.<sup>48</sup>

## It is estimated that unofficial and smuggled gold exports to Egypt account for about 60 per cent of the production from Northern, River Nile and Red Sea states.

As financing the war effort became a top priority, the Port Sudan authorities geared their diplomatic outreach to Russia and China, encouraging the return of companies from these countries that had left following the war and offering new opportunities to invest in the gold sector. The authorities also reduced corporation tax for gold companies from 28 per cent to 18 per cent and on those operating in traditional mining to 20 per cent,<sup>49</sup> additionally waiving the collection of fees for transferring gold produced in traditional mining areas to city markets for sale or export. This incentive was to encourage small producers to use official trading and export channels and thus to improve the tax revenues of the Port Sudan authorities.<sup>50</sup>

<sup>46</sup> Established in 2012, it was granted mining rights in Block 17, an area of 11,569 square kilometers in Abu Sari. The government of Sudan has an 18 per cent stake in the company. Under Bashir's *Tamkeen* system, senior officials in the ruling party, members of their families, and their business partners occupied seats on the board of the joint venture, including Bashir's brother and a controversial Turkish investor with extensive business ties to the Sudanese military corporations. Jamal, A. (2024), 'Gold mining war in Northern State', *Atar: Sudan in Perspective*, 4, pp. 1–6, <https://atarnetwork.com/wp-content/uploads/2024/05/ATAR-English-Issue-4-Gold-mining-war-in-Northern-State.pdf>.

<sup>47</sup> Sudaress (2021), 'مقتل مواطن وجرح 3 عسكريين في اشتباكات بين الشرطة وقوة مسلحة بدلقو', [A citizen was killed and 3 soldiers were wounded in clashes between the police and an armed force in Dalgo], *al-Jareeda*, 14 July 2021, <https://www.sudaress.com/alrakoba/31588430>.

<sup>48</sup> According to a pamphlet published by TAM – The Alliance of Demand-based Organizations (2024), 'دلقو للتعددين', [Delgo Company: the true face of the war], August 2024, [https://drive.google.com/file/d/1zYNVjVwRBxC4\\_Tesd-OrIEGlgN--cPD/view](https://drive.google.com/file/d/1zYNVjVwRBxC4_Tesd-OrIEGlgN--cPD/view).

<sup>49</sup> Sudan Peace Tracker (2025), 'The Mystery of the Missing \$2.3 Billion: How Gold Funds Sudan's War', 8 March 2025, <https://sudanpeacetracker.com/archives/867>.

<sup>50</sup> Information from an official source in Port Sudan via messaging, January 2025, copy on file.

According to the SMRC, gold production rebounded to a reported 23.2 tonnes (in SAF-held areas) by the end of 2023, but this was still far below the last pre-war official national annual production figure of 87 tonnes for 2022.<sup>51</sup> Official sources have indicated a steady increase in the volume of gold production from both the artisanal and industrialized mining sectors. Gold production in SAF-controlled areas jumped again to 64.36 tonnes in 2024. The Port Sudan authorities claim to have exported 27.96 tonnes of gold in 2024, generating nearly \$1.6 billion.<sup>52</sup>

Much of the production from SAF-controlled areas is likely to have been exported to Egypt. There are no accurate data on how much gold from Sudan is reaching Egypt. Figures from the Central Bank of Sudan indicate that the country exported only \$16 million worth of gold to its northern neighbour in 2024 – just 1 per cent of total gold exports.<sup>53</sup> However, in reality it is estimated that unofficial and smuggled gold exports to Egypt account for about 60 per cent of the production from Northern, River Nile and Red Sea states, areas that have shared borders with Egypt.<sup>54</sup> Research suggests that the amount smuggled into Egypt is upward of 100 kg per day, equating to more than 60 tonnes since the war began (2023 and 2024).<sup>55</sup>

Several factors account for this flow. Since the beginning of the war, the SAF has sought to transfer gold to Egypt to prevent it from being sent directly to the UAE, which it accuses of supporting the RSF. Furthermore, smugglers are attracted by differential pricing in Egyptian and Sudanese markets, as well as a lower tax burden in Egypt. In May 2023, the Egyptian government issued a decision to exempt gold imports from any customs duties or tax, including unprocessed (raw) gold, regardless of the quantities or methods of obtaining it. In October 2024, one gram of 21-carat gold sold for \$85 (equivalent to 4,090 Egyptian pounds),<sup>56</sup> while in Sudan, the price for the same amount of gold was between \$55 and \$60 (around 144,000 Sudanese pounds).<sup>57</sup> Sudanese traders also avoid paying the Port Sudan authorities 28 per cent in taxes (subsequently reduced to 20 per cent), instead paying around 10 per cent in fees for gold to be smuggled to Cairo's markets. Though smuggling is fraught with corruption

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<sup>51</sup> The Central Bank of Sudan and SMRC had vastly differing figures for 2022, with the latter's production figure 41.8 tonnes. See Sudanese Mineral Resources Company (2024), *SMRC 2024 Achievements*; Sudan Transparency and Policy Tracker (2024), *Fueling Sudan's War: How Gold Exports and Smuggling Are Prolonging the Conflict*, New Jersey: Sudan Transparency and Policy Tracker, <https://sudantransparency.org/fueling-sudans-war-how-gold-exports-and-smuggling-are-prolonging-the-conflict>.

<sup>52</sup> SMRC figures for 2024 show exports of 27.96 tonnes of gold, with a value of \$1.59 billion. Central Bank of Sudan figures are consistent but differ slightly, showing exports of 22.92 tonnes of gold, with a value of \$1.57 billion. See Sudanese Mineral Resources Company (2024), *SMRC 2024 Achievements*; Central Bank of Sudan (2024), 'Foreign Trade Statistical Digest, January – December 2024', 60(1), Policies, Research and Statistics Department, <https://cbos.gov.sd/en/content/jan-dec-2024>.

<sup>53</sup> Central Bank of Sudan export figures for 2024 show Sudan exported \$16.3 million worth of gold to Egypt, out of a total export value of \$1.57 billion. See Central Bank of Sudan (2024), 'Foreign Trade Statistical Digest, January – December 2024'.

<sup>54</sup> Official production figures are notoriously unreliable. Much of the production is not captured in official statistics. See Sudan Transparency and Policy Tracker (2024), *Fueling Sudan's War*.

<sup>55</sup> Research interview with senior Sudanese economist and expert on strategic commodities, under the condition of anonymity, 27 September 2024; research interview with Sudanese gold producer, under the condition of anonymity, 25 October 2024.

<sup>56</sup> Research interview with Sudanese gold producer, under the condition of anonymity, 1 October 2024.

<sup>57</sup> Research interview with Sudanese gold producer, under the condition of anonymity, 4 March 2024.

and Sudanese traders risk imprisonment or having their gold confiscated by police, profits from gold smuggled across the Egyptian border in 2023 and 2024 have been reported to range between 60 to 80 per cent.<sup>58</sup>

But while the traders and smugglers have profited, Sudanese producers and wider society have not. The money received by Sudanese traders is used to purchase commodities in Egypt including foodstuffs and cooking oil that are then exported to Sudan, as well as inputs for mining such as fuel, mercury and cyanide. Currency from gold is also used to provide for displaced families in Egypt, including housing, services and other goods. Egypt's economy receives multiple benefits from Sudan's lucrative conflict commodity.

The smuggling of commodities into Sudan is also connected to human smuggling, which expanded after June 2023 when the Egyptian government sought to contain refugee numbers by requiring all Sudanese travellers to obtain a visa, a laborious process taking months.<sup>59</sup> Consequently, a smuggling network evolved transporting people and gold from Sudan to Egypt. Due to the declining value of the Sudanese pound, refugees are increasingly being asked to pay for their journeys in gold, with some paying 2–15 grams of gold or \$300–500 per person.<sup>60</sup> On their return to Sudan, these smuggling trucks are loaded with production inputs and fuel, with the average quantities of cyanide, carbon, thiourea and other production inputs reaching about 160 tonnes per month.<sup>61</sup>

## **RSF-controlled areas**

In contrast to SAF-controlled areas, gold production in RSF zones has remained mostly artisanal. There are large ASGM areas in North and South Darfur, and parts of South, West, and North Kordofan states in RSF-controlled areas. The RSF is involved in three types of intervention in the gold sector: as a protection force for its own gold mining and trading activities through the Al-Junaid Company,<sup>62</sup> in Songo in South Darfur, Jebel Amer in North Darfur, and Talodi in South Kordofan; in the form of imposed protection that ensures artisanal miners trade through RSF channels; and through some RSF units directly engaging in artisanal gold production where conditions permit. A recent report by the UN panel of experts on Sudan suggests that around 10 tonnes of gold

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<sup>58</sup> Ibid.

<sup>59</sup> Egyptian State Information Service (2023), 'Egypt introduces entry visa for Sudanese citizens to 'regulate, not restrict, entry'', press release, 10 June 2023, <https://www.sis.gov.eg/Story/182049/Egypt-introduces-entry-visa-for-Sudanese-citizens-to-%E2%80%98regulate%2C-not-restrict%2C-entry%E2%80%99?lang=en-us>.

<sup>60</sup> Sudan Transparency and Policy Tracker (2024), *Fueling Sudan's War*, p. 9.

<sup>61</sup> Field research interviews conducted in southern Egypt, August 2024.

<sup>62</sup> Al-Junaid Company for Multi Activities is a private holding company headed by Abdelrahim Dagalo, the RSF's second in command. It was incorporated as a private company in 2009, and subsequently established Al-Junaid for the Treatment of Mineral Waste, a subsidiary that monopolized the treatment of gold tailings produced by thousands of miners in Jebel Amer. The RSF served as a protection force for Al-Junaid's two processing factories and secured the area, ensuring the exclusion of the national police and other government oversight bodies, even though the RSF was a regular government force by law under political decree.

with a value of \$860 million was extracted from RSF-controlled areas in 2024, although this figure is heavily disputed, particularly given the sharp decline in Jebel Amer's production.<sup>63</sup>

North Darfur state, Jebel Amer in particular, was one of the epicentres of Sudan's gold boom from 2012.<sup>64</sup> As one of the largest gold mines in Africa during that time, with mining wells spread over an area of around 26 square kilometres and an estimated annual production of 15 tonnes, it attracted up to 100,000 migrant workers from different countries, including Chad, Libya and Niger,<sup>65</sup> and was considered a melting pot for diverse Sudanese ethnicities.

However, social cohesion was shattered by the Bashir government when it established control of the mine through security agencies, notably using the Border Guard Forces (BGF), led by militia leader Musa Hilal.<sup>66</sup> From 2013, another emerging Janjaweed militia group, which was to become the RSF, ousted Hilal's BGF and took control of Jebel Amer, excluding the national police and other government bodies and monopolizing the treatment of gold tailings.<sup>67</sup>

Under RSF control, production in Jebel Amer declined significantly. In 2017 and 2018, the area's annual production dropped to between 14 kg and 17 kg, which was not sufficient to cover operating costs. Nonetheless, General Hemedti used his position as deputy chairman of the Transitional Sovereignty Council during the 2019–2021 transition to broker a deal with the civilian-led government to relinquish the RSF concession rights to Jebel Amer in return for \$250 million in government payments and exemptions from royalties and taxes for other RSF operations, enabling the RSF business dominated by his family, Al-Junaid Company, to accelerate its dominance in the gold sector.<sup>68</sup> When the war started,

<sup>63</sup> Citing interviews with local monitors and sources in RSF gold-mining areas from August and September 2024, the UN Panel of Experts on Sudan suggested that the RSF produced nearly 10 tonnes of gold in 2024 from Jebel Amer, Songo and other mining areas under its control. However, the authors question the accuracy of these figures. The processing factories controlled by the RSF in Jebel Amer, North Darfur, Songo, and South Darfur, would produce a maximum of 1 tonne according to discussions with sources knowledgeable with the production bottlenecks in both locations. It is doubtful that Al-Junaid's purchases of gold from independent ASGM miners could amount to the difference of 9 tonnes. See UN Panel of Experts on the Sudan (draft, 2024), *Second Quarterly Update*, 18 November 2024, p. 2, draft copy reviewed by the authors.

<sup>64</sup> Administratively located in the As-Serief locality of Kabkabiya district, Jebel Amer falls within the customary territory of the Beni Hussein group, which is classified among the Arab groups in the region. Before the discovery of mining (in Sabrna and Jebel Amer), As-Serief was considered a melting pot for Arab and non-Arab ethnicities (such as Madinga, Bashishat, Najma, Misseriya, Saada and Druk). Field research interviews conducted in North Darfur, August 2024.

<sup>65</sup> Ismail, O. and Kumar, A. (2013), 'Darfur's Gold Rush State-Sponsored Atrocities 10 Years After the Genocide', joint Enough Project, the Satellite Sentinel Project, and Digital Globe report, May 2013, [https://enoughproject.org/files/Darfur\\_Gold\\_Rush.pdf](https://enoughproject.org/files/Darfur_Gold_Rush.pdf); Lessing, U. (2013), 'تقرير خاص - حمى الذهب تؤجج الصراع في دارفور', [Special Report- Gold fever intensifies conflict in Darfur], Reuters, 10 October 2013, <https://www.reuters.com/article/amp/idARAL6N0HY2X620131010>; Tubiana, J. (2014), 'Out for Gold and Blood in Sudan', *Foreign Affairs*, 1 May 2014, <https://www.foreignaffairs.com/articles/sudan/2014-05-01/out-gold-and-blood-sudan>.

<sup>66</sup> Musa Hilal was the first leader of the Janjaweed, later officially recognized as the BGF. He was the paramount chief of the group of tribal leaders who controlled the mining operations in Jebel Amer, until ousted by the RSF in 2013, becoming a fierce rival of Hemedti. He is also the leader of the Rizeigat Abbala, Mahamid Um Jallul. Field research interviews conducted in North Darfur, August 2024.

<sup>67</sup> Al Hurra (2019), 'تلال من ذهب في السودان... ما قضية جبل عامر والبشير و"حلفائه الأعداء؟"', 28 November 2019, <https://www.alhurra.com/sudan/2019/11/28/-السودان-في-الذهب-في-السودان>.

<sup>68</sup> The compensation package for Al-Junaid Company included \$50 million in cash (paid in local currency), tax and royalty exemptions for the company's other gold operations up to \$50 million, and a 34 per cent stake in the state-owned Sudamin Company, one of the most profitable for the Ministry of Finance, which imported material and equipment for the mining sector, and had a monopoly over the import of mercury and cyanide. Despite protests from the media and anti-corruption advocates, officials defended the deal as compensation for the block's estimated gold reserves and the company's facilities at the site. See Ultra Sudan (2020), 'كيانات التعدين تتهم المالية بالتنازل بسهولة عن أسهم سودامين لـ"الجنيدي"', 19 October 2020, <https://ultrasudan.ultrasawt.com/كيانات-التعدين-تتهم-المالية-بالتنازل-بسهولة-عن-أسهم-سودامين-ل-الجنيدي-محمّد-حلفاوي-الصح-يا-ترس-بمقاومة/>

the RSF moved quickly to recapture Jebel Amer, though mining activity has subsequently largely ceased.

Gold mining activities also expanded in other areas of North Darfur during the pre-war gold boom, including in places such as Hashaba, Malha and Abdel Shakour, which were far from the oversight of central government in Khartoum or El Fasher. Hashaba is currently the largest gold mining site in North Darfur, located on land customarily belonging to the Zaghawa group and near the homeland of the commander of the RSF. The expansion of mines in Hashaba is one of the main reasons mining stopped in the Jebel Amer area after 2020, in addition to the decline in production. Before the war, these mines were controlled by the RSF using companies that were not officially registered and did not pay taxes to the government, which boosted financial returns.<sup>69</sup> These companies remain connected to the RSF primarily through local leaders.<sup>70</sup>

## The Songo mines have become the most important production area for the RSF since the decline of Jebel Amer.

The Songo mines in the Al-Radom area of South Darfur state, close to the border with South Sudan, have become the most important production area for the RSF since the decline of Jebel Amer.<sup>71</sup> As far as is known, the RSF's Al-Junaid company also maintains its only tailings processing factory in South Darfur in Songo. Although production figures are difficult to obtain, an uncorroborated report from 2020 claimed that the Al-Junaid facility in Songo 'produced 150 kg per day' – this is likely an exaggeration and is not supported by other estimates – and that an airstrip had been constructed inside the compound for transporting 'gold'.<sup>72</sup> Additionally, there are indications that gold from Songo has been smuggled out of other airports in Darfur, including Nyala, the capital of South Darfur.<sup>73</sup> The RSF is widely believed to have received military supplies via Nyala airport,

<sup>69</sup> Chevillon-Guibert, R., Ille, E. and Abdelrahman, M. S. (2024), 'Gold mining in Darfur: Its role in the general economy, political conflicts and the current war', *The Journal of Social Encounters*, 8(2), pp. 20–34, <https://doi.org/10.69755/2995-2212.1278>.

<sup>70</sup> Most notably the Peace Shield mobile commander and the commander of the RSF in North Kordofan State, General Al-Nur Quba and General Gedo Hamdan Abu Shouk, respectively. Field research interviews conducted in North Darfur, August 2024. The latter was killed by an airstrike in August 2024. See Camilleri, M. (2024), 'Rapid Support Forces Major General Gedo Hamdan killed by airstrike', *The Maltese Herald*, 21 August 2024, <https://themalteseherald.com/2024/08/21/gedo-hamdan-abu-shouk>.

<sup>71</sup> Ayin Network (2025), 'The Sungu mines — gold that fuels RSF's war', 18 January 2025, <https://3ayin.com/en/rsfgold>.

<sup>72</sup> The report also states that 'the RSF in the mine prevent approaching the headquarters of the Junaid Company, vowing deterrent penalties for those who come close to the gold firm': Darfur 24 (2020), 'Al-Junaid Gold Mining company produces 150 kgs of Gold per day', 23 April 2020, <https://www.darfur24.com/en/2020/04/23/al-junaid-gold-mining-company-produces-150-kgs-of-gold-per-day>.

<sup>73</sup> Research interview with Darfur expert and civil society representative, under the condition of anonymity, 26 September 2024.

which the SAF claims were sent from the UAE. The SAF repeatedly bombed Nyala airport during 2024, leaving it unusable.<sup>74</sup> But since January 2025, the RSF has rehabilitated the airport, including the runway.<sup>75</sup>

Finally, gold mining in the al-Muthaleth tri-border region of Libya, Sudan and Egypt has gone through intermittent development since its discovery around late 2012.<sup>76</sup> Mining is largely artisanal, and the remote location means that production costs often surpass incomes.<sup>77</sup> However, Libya has become a key hub for gold trafficking, from goldfields such as Kouri Bougoudi, Tibesti and Ezri on the Chad–Libya border, as well as from al-Muthaleth,<sup>78</sup> with smugglers including senior commanders of the Libyan Arab Armed Forces (LAAF), the dominant non-state armed actor in eastern Libya, flying gold to Istanbul and Dubai.<sup>79</sup> Gold smuggling operations to Türkiye are also run through Misrata and Maitiga airports in Libya.<sup>80</sup> The most important local group on the Libyan side of al-Muthaleth, Subul al-Salam, was officially integrated into the LAAF in 2016, and reports have long claimed LAAF support for the RSF,<sup>81</sup> largely due to both groups receiving UAE backing, shared connections with the Wagner Group/Africa Corps, and the importance of fuel smuggling from Libya to Sudan. Due to their mutual allies and economic interests, the LAAF has allowed eastern Libya to be a staging-post for RSF support, from allied Sudanese militias and international mercenaries.<sup>82</sup>

Much of the gold from North Darfur is smuggled from RSF areas to Chad for onwards transportation to the UAE.<sup>83</sup> There have been ongoing battles between the RSF and the SAF-allied Joint Darfur Forces to control border access with Chad, which is critical for supply lines and for ensuring that gold in northern Sudan can

<sup>74</sup> Sudan Tribune (2024), 'Sudanese army bombs Nyala Airport, heavy damage reported', 24 September 2024, <https://sudantribune.com/article291306/>; Sudan Tribune (2024), 'Sudan's RSF arrests dozens in Nyala after air strikes', 11 December 2024, <https://sudantribune.com/article294523>.

<sup>75</sup> Alnaser, H., Idris, M., Alagra, M. and al-Faroug, O (2025), 'Sudan Nashra: RSF develops airbase at Nyala Airport with UAE backing | Military lifts sieges on Obeid, Dalang in Kordofan | More Khartoum bridges fall under military control', Mada Masr, 28 February 2025, <https://www.madamasr.com/en/2025/02/28/news/politics/373951>.

<sup>76</sup> Jespersion, S., Henriksen, R., Pravettoni, R. and Nellemann, C. (2021), 'Illicit Flows Fuelling Conflict in the Tri-Border: Migration and Artisanal gold mining in Sudan, Chad and Libya', RHIPTO, XCEPT Research Report, June 2021, <https://doi.org/10.55317/9781784136376>; Eaton, T. and Yousef, L. (2025), *How migrant smuggling has fuelled conflict in Libya: A systems analysis of key transit hubs*, Research Paper, London: Royal Institute of International Affairs, <https://doi.org/10.55317/9781784136376>.

<sup>77</sup> Field research interviews conducted in Kufra, southern Libya, December 2023.

<sup>78</sup> Jespersion, Henriksen, Pravettoni and Nellemann (2021), 'Illicit Flows Fuelling Conflict in the Tri-Border'; Libya Review (2024), 'UN: Libya Central to Regional Gold Trafficking', 18 May 2024, <https://libyareview.com/44326/un-libya-central-to-regional-gold-trafficking>.

<sup>79</sup> In 2020, the RFI reported that Saddam Haftar, LAAF's chief of staff of land forces, was among those smuggling gold in east Libya, where his family's private jet was utilized to smuggle gold to Türkiye and the UAE. See RFI (2020), 'RFI: Haftar is using his private jet for money laundering, gold smuggling'.

<sup>80</sup> Cousins, M. (2016), 'Gold smuggling plot thwarted: report', Libya Herald; Alwasat (2024), 'Attorney General Al-Sur: Investigation ongoing into gold smuggling through Misrata Airport'; UN Panel of Experts on Libya (2024), 'Final report of the Panel of Experts established pursuant to Resolution 1973 (2011) concerning Libya', 6 December 2024, New York: UN, p.9, <https://digitallibrary.un.org/record/4073810?v=pdf>.

<sup>81</sup> Eaton, T. and Yousef, L. (2025), *How migrant smuggling has fuelled conflict in Libya*; Burke, J. and Salih, Z. M. (2023), 'Libyan warlord could plunge Sudan into a drawn-out 'nightmare' conflict', *Guardian*.

<sup>82</sup> UN Panel of Experts on Libya (2024), 'Final report of the Panel of Experts established pursuant to Resolution 1973 (2011) concerning Libya'; Sudan Tribune (2025), 'Darfur joint force claim victory over RSF forces entering from Libya', 20 January 2025, <https://sudantribune.com/article296272>; Alvarez, S. R. (2025), 'Lobos del Desierto': así operan los mercenarios colombianos en Sudán' ['Desert Wolves: How Colombian Mercenaries Operate in Sudan'], 2 March 2025, <https://www.lasillavacia.com/silla-nacional/lobos-del-desierto-asi-operan-los-mercenarios-colombianos-en-sudan>.

<sup>83</sup> Ayin Network (2025), 'The Sungu mines — gold that fuels RSF's war'.

be exported.<sup>84</sup> Reports suggest that the RSF has also received weapons and logistics resupply via an airstrip in Amdjarass, across the border in northeastern Chad, where in 2023 the UAE established a field hospital to officially treat Sudanese refugees, with the possibility that gold is also flown out in return.<sup>85</sup>

The RSF's gold smuggling from South Darfur via South Sudan reportedly increased after the war started. RSF forces have been reported to be present in South Sudan's Raja county in Northern Bahr El-Ghazal state, which has shared borders with South Darfur's Songo, the mineral-rich Huftrat El-Nahas (a copper mine), and Kafka Kinji localities straddling the borders between the two countries and the neighbouring Central African Republic. These are areas where the South Sudanese government has limited reach, and there are suggestions that gold is smuggled from Raja county by road or plane to Juba and onto Entebbe in Uganda, where it is exported to the UAE.<sup>86</sup> There are also reports that the RSF smuggled gold to the Central African Republic, working in partnership with the Russian Africa Corps.<sup>87</sup>

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<sup>84</sup> Fighting in October 2024 saw the RSF reclaim Kulbus, south of the border town of Tine, which is controlled by the Joint Darfur Forces, led by Zaghawa tribal forces including the Sudan Liberation Movement/Army (SLA), led by Minni Minnawi the governor of Darfur, another SLA faction led by Mustafa Tambour, and the Justice and Equality Movement (JEM) faction led by Finance Minister Gibril Ibrahim.

<sup>85</sup> Levinson, R. and Lewis, D. (2024), 'Dozens of UAE flights head to airstrip UN says supplies arms to Sudan rebels', Reuters, 12 December 2024, [https://www.reuters.com/world/uae-flights-flood-airstrip-un-says-supplies-weapons-sudan-rebels-2024-12-12/#:~:text=LONDON%2C%20Dec%2012%20\(Reuters\),data%20and%20satellite%20images%20show](https://www.reuters.com/world/uae-flights-flood-airstrip-un-says-supplies-weapons-sudan-rebels-2024-12-12/#:~:text=LONDON%2C%20Dec%2012%20(Reuters),data%20and%20satellite%20images%20show); Africa Defense Forum (2025), 'Evidence of UAE Supplying RSF Continues to Mount', 7 January 2025, <https://adf-magazine.com/2025/01/evidence-of-uae-supplying-rsf-continues-to-mount>; Conflict Observatory (2024), *Foreign Facilitators of Weapons Fuelling Sudan's Civil War*, United States: Conflict Observatory, <https://hub.conflictobservatory.org/portal/apps/sites/#/sudan>.

<sup>86</sup> Walsh, D. (2024), 'The Gold Rush at the Heart of a Civil War', *New York Times*, 11 December 2024, <https://www.nytimes.com/2024/12/11/world/africa/sudan-gold-rush-heart-civil-war.html>.

<sup>87</sup> Darfur 24 (2023), 'Gold mines, another battlefield between the Sudanese army and RSF', Darfur 24 & Ayin Network, 13 October 2023, <https://www.darfur24.com/en/2023/10/13/gold-mines-another-battlefield-between-the-sudanese-army-and-rsf>; Elbagir, N. et al. (2022), 'Russia is plundering gold in Sudan to boost Putin's war effort in Ukraine', CNN, 29 July 2022, <https://edition.cnn.com/2022/07/29/africa/sudan-russia-gold-investigation-cmd-intl/index.html>.

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# 04

# How Sudan's gold sector connects to a regional conflict ecosystem

**Sudan's warring parties export gold through, and to, allied and adversarial states; the commodity has become a key element in shaping the actions of external players in Sudan's conflict.**

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## Gold within a regional conflict ecosystem

Sudan's warring parties are reliant on the production and export of gold to sustain themselves and their war efforts. Since the beginning of the conflict, Sudan's state institutions and the formal economy have largely collapsed, allowing the development of an extensive and evolving war economy.<sup>88</sup> This war economy encompasses the production and trade of several commodities – including gold, oil, gum arabic, livestock and agricultural products such as sesame<sup>89</sup> – at the level of increasingly subnational, localized theatres of conflict. Sudan's war economy both influences and is influenced by neighbouring states, linking the country to a regional

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<sup>88</sup> Eaton, T. (2018), *Libya's War Economy Predation, Profiteering and State Weakness*, Research Paper, London: Royal Institute of International Affairs, <https://www.chathamhouse.org/sites/default/files/publications/research/2018-04-12-libyas-war-economy-eaton-final.pdf>.

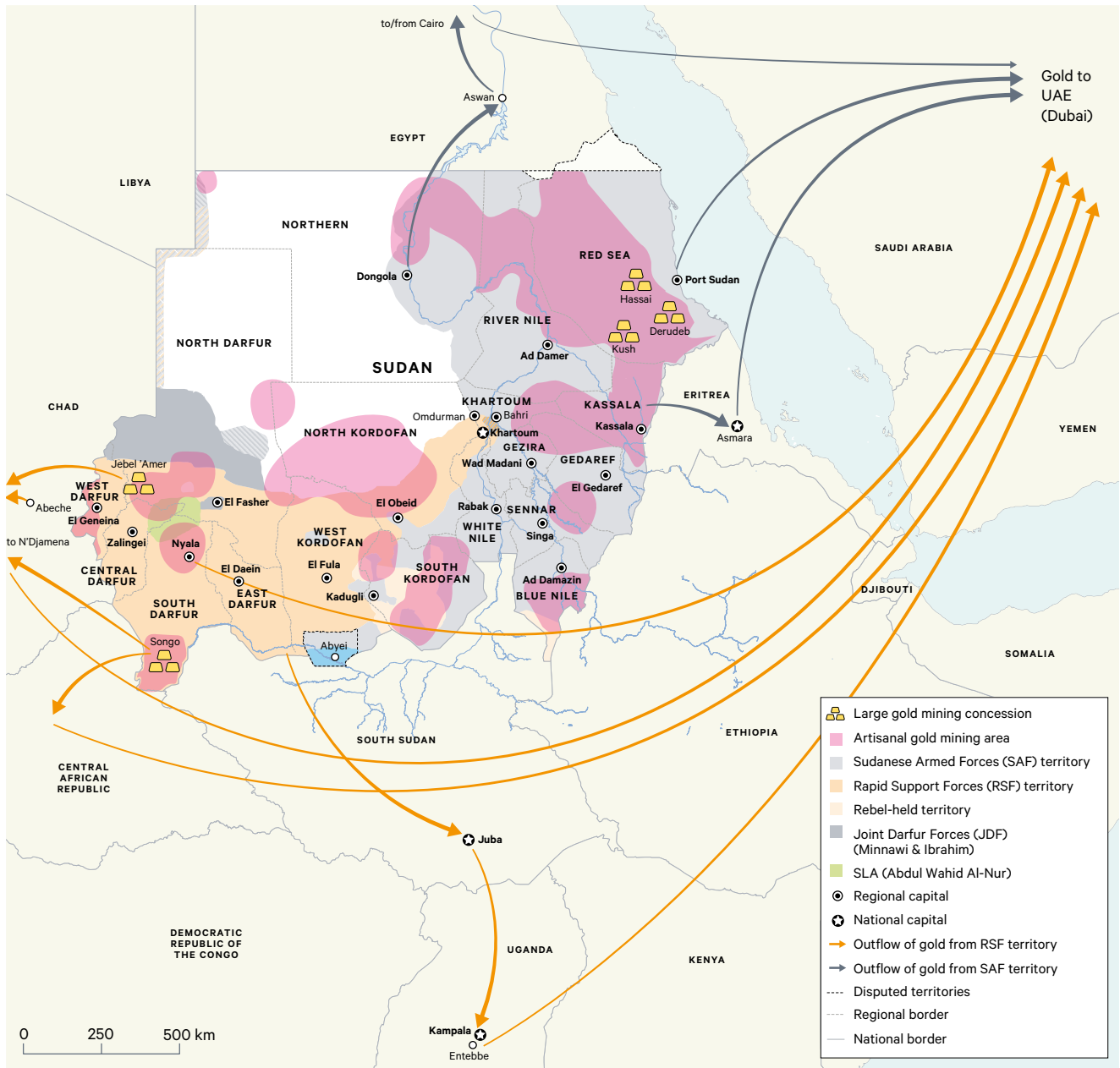
<sup>89</sup> Soliman, A. and Demissie, A. A. (2024), *The 'conflict economy' of sesame in Ethiopia and Sudan: How the sector has become entangled in local and transnational conflict, and how policymakers need to respond*, Research Paper, London: Royal Institute of International Affairs, <https://doi.org/10.55317/9781784135997>.

## Gold and the war in Sudan

How regional solutions can support an end to conflict

conflict ecosystem, consisting of intersecting cross-border networks of power, in which state and non-state actors compete over ideological, military, economic and political authority.<sup>90</sup> Figure 3 highlights the movement of gold within this ecosystem.

**Figure 3.** How gold links Sudan to the regional conflict ecosystem



Source: Based on Concession & Investment Blocks Map of Sudan 2023, Geological Research Authority of Sudan, Ministry of Minerals; Map of migrant smuggling routes in Libya, Chad and Sudan, 2021, in Jespersen, Henriksen, Pravettoni and Nellemann (2021), 'Illicit Flows Fuelling Conflict in the Tri-Border, p. 44; Map produced by Thomas van Linge.

Note: SLA = Sudan Liberation Movement/Army.

<sup>90</sup> Mansour (2024), 'Introduction: The Transnational Conflict Ecosystem'.

These links are facilitated through both ‘inside-out’ and ‘outside-in’ mechanisms. ‘Inside-out’ dynamics refer to the activities that lead to the regionalization of a local conflict as it spills over national borders, while ‘outside-in’ dynamics are the interventions from external actors and processes (political, military, economic or ideological) that fuel local conflict.

### ‘Inside-out’ conflict dynamics

Sudan’s conflict has seen its gold sector flourish, notably ASGM.<sup>91</sup> With limited input costs, a reliance on cheap manual labour and a highly mobile product, state and non-state armed actors are easily able to exploit this valuable commodity and smuggle it across borders. Gold smuggling out of Sudan is not new, but an increasingly decentralized and informal war economy has led to the further expansion of this activity and a shift in smuggling routes that transport gold primarily to the UAE through Chad, Eritrea, Egypt and South Sudan.

Gold smuggling has embedded Sudan in a regional conflict ecosystem. The need for Sudan’s belligerents to find buyers for gold and determine gold export routes has made them responsive to internal factors in neighbouring countries, including levels of security and stability, the relationship between governments and Sudan’s warring parties, and the size of mining markets.

Gold production from RSF zones is predominantly ASGM and smuggled via a transnational network that syphons the majority of Africa’s gold production to the UAE.<sup>92</sup> This has had different local impacts depending on the nature of cross-border relationships and power balances. For instance, the smuggling of gold by the RSF via South Sudan has been moderated by pre-existing ties between Sudanese (including the SAF) and South Sudanese leaders, and South Sudan’s economic vulnerability. The RSF has established investments in South Sudan, and its leaders remain well connected with senior officials. Moreover, South Sudan has also been careful to balance relations as the war has led to a critical decline in its oil exports, which transit Sudanese-controlled pipelines in both SAF- and RSF-held areas and make up 90 per cent of government revenue. This may have led South Sudanese officials to quietly acquiesce to the RSF’s gold transfers on their territory, both for financial benefit and to facilitate continued relations around the more critical issue of re-establishing oil exports.

However, the South Sudan government’s economic plight has also seen them seek investment from the UAE, reportedly including leveraging future oil sales in return for a substantial loan, which has had negative consequences for their perceived neutrality.<sup>93</sup> Furthermore, the announcement of the donation of a field hospital

<sup>91</sup> The ASGM sector produced 84.2 per cent of Sudan’s total official gold production of 445.6 tonnes between 2014 and 2018, according to the Mining Ministry’s Annual Performance Review for 2018 and the first half of 2019. The remaining 15.8 per cent, representing 70.5 tons, was produced by franchise, processing and small-scale companies. See, Government of Sudan (undated), *Features and Figures on the Performance of the Ministry of Minerals*, Annual Review for 2018 and the first half of 2019, p.14, received in hard copy.

<sup>92</sup> Ummel, M. and Schulz, Y. (2024), *On the trail of African gold: Quantifying production and trade to combat illicit flows*, Bern: SWISSAID, <https://swissaid.kinsta.cloud/wp-content/uploads/2024/05/swissaid-on-the-trail-of-african-gold-web-ok.pdf>.

<sup>93</sup> Sudans Post (2025), ‘South Sudan’s Kiir, UAE’s Al Nahyan discuss ties’, 8 February 2025, <https://www.sudanspost.com/south-sudans-kiir-uaes-al-nahyand-discuss-ties>.

by the UAE to South Sudan, to be located in Madol, Northern Bahr el Ghazal State, close to the border with Sudan, has led to claims it will be used to support the RSF, similar to Amdjarass in Chad.<sup>94</sup>

## **Sudanese gold producers, traders, engineers and miners who have been forcibly displaced by the war have resorted to exporting their expertise to established mining areas across the borders in northern Chad, southern Egypt and South Sudan.**

Smuggling via Libya, conversely, has reflected the relative political, economic and security influence of the LAAF in relation to Sudanese armed actors. Both the RSF and the SAF have sought to control the lucrative and essential illicit fuel trade from southern Libya, which has scaled up dramatically since 2022 as a result of elite capture of Libya's oil sector.<sup>95</sup> Demand and the cost of fuel increased during the war in Sudan as a result of scarcity.<sup>96</sup> The LAAF and its local Subul al-Salam allies likely supplied the RSF with fuel before the war and shortly after it began, as part of regular trading and security assistance, and at the same time small amounts of gold from al-Muthaleth were smuggled via Libya. However, the RSF was forced to abandon control of Sudan's borders with Libya in August 2023, which were taken over by the SAF and Joint Darfur Forces,<sup>97</sup> meaning that fuel from Libya has largely been going to SAF-aligned zones, and not those held by the RSF. The border remains contested and a 2024 report by the UN Panel of Experts on Sudan stated that fuel smuggled from Libya to El Fasher, the besieged capital of North Darfur, supplies both warring factions in Sudan.<sup>98</sup> In any case, the LAAF and Subul al-Salam operate an industrial-scale fuel smuggling operation into Sudan that has continued regardless of which Sudanese group is in control of the borderlands,<sup>99</sup> with goods also flowing from Sudan into Libya, including essential production inputs for the goldfields in Libya and Chad – such as spare parts, crushers, wet mills and especially chemicals used for gold extraction such as carbon and cyanide.<sup>100</sup>

'Inside-out' dynamics have also played out across Sudan's border with Egypt, in this case reflecting a tension between formal and informal gold exports from SAF-controlled zones where ASGM is mixed with large-scale production. The SAF

<sup>94</sup> Sudan Tribune (2025), 'Sudan accuses South Sudan of allowing UAE 'aggression base'', 8 March 2025, <https://sudantribune.com/article298306>.

<sup>95</sup> Eaton, T. (2025), 'The Consolidation of Elite Network Control Over Libyan State Institutions', in Lacher, W. and Said, S. (eds) (2025), *Coercion, predation and state formation in Libya and Iraq: Parallel perspectives*, March 2025, Friedrich-Ebert-Stiftung, p. 7, <https://library.fes.de/pdf-files/bueros/libyen/21921.pdf>.

<sup>96</sup> Sudan Transparency And Policy Tracker and New Features Multimedia (2024), 'Fueling Sudan's War How Oil Exports, Imports, and Smuggling are Prolonging the Conflict', July 2024, <https://sudantransparency.org/fueling-sudans-war-how-oil-exports-imports-and-smuggling-are-prolonging-the-conflict-fueling-sudans-war>.

<sup>97</sup> Field research interviews conducted in Kufra, southern Libya, December 2023.

<sup>98</sup> UN Panel of Experts on the Sudan (2024), 'Final report of Panel of Experts on the Sudan established pursuant to Resolution 1591 (2005)', 15 January 2024, New York: UN, <https://digitallibrary.un.org/record/4039195?ln=en&v=pdf>.

<sup>99</sup> UN Panel of Experts on Libya (2024), 'Final report of the Panel of Experts established pursuant to Resolution 1973 (2011) concerning Libya'; Research interview by phone with fuel smuggler of Tebu origin under the condition of anonymity, based in Kufra, southern Libya, December 2023.

<sup>100</sup> Sudan has become the biggest importer of cyanide in Africa and is re-exporting high volumes to mines in southern Libya, Chad and elsewhere in the Sahel.

has encouraged gold exports to Egypt in order to prevent the commodity from reaching the UAE, and the SAF has sought to maximize its income through the levying of taxes and tariffs. However, the availability of high profits and Egypt's removal of import duties for gold have seen smuggling accelerate. Despite the SAF's efforts to the contrary, much of the gold that moves from Sudan to Egypt ultimately ends up in the UAE via re-export. The continued flow of gold to Egypt reflects the SAF's dependence on Egyptian security and political support. Egypt remains deeply intertwined in Sudanese politics, and Port Sudan's need for good relations is reflected in SAF leader General Burhan's appointment of Ali Yousif as the acting foreign minister in November 2024: Yousif lived in Cairo following the overthrow of Bashir and had been head of the Popular Initiative to Support Sudanese–Egyptian Relations.

Alongside physical gold, 'inside-out' dynamics connected to gold have also seen large-scale movements of people and expertise across Sudan's borders. Sudanese gold producers, traders, engineers and miners who have been forcibly displaced by the war have resorted to exporting their expertise to established mining areas across the borders in northern Chad (such as Kouri Bougoudi), southern Egypt (including the disputed areas of Halayeb and Shalateen) and South Sudan (Kapoeta).

The influx of Sudanese refugees into Libya through Kufra has increased since January 2024,<sup>101</sup> with the World Food Programme (WFP) estimating that there are some 21,000 displaced Sudanese in Kufra,<sup>102</sup> though the number is difficult to determine because many were already working in the community prior to the conflict in Sudan.<sup>103</sup> The presence of Sudanese has contributed to a local economic boom, and the town is home to vibrant licit and illicit economies that have significantly contributed to local economic well-being, peace and stability.<sup>104</sup> This has also attracted an increasing number of Sudanese workers, who have contributed substantially to local economic growth by renting houses and working in restaurants, cafes, car repair centres, makeshift markets, human smuggling and as taxi drivers.<sup>105</sup> The increased presence of Sudanese has also provided professional workers and academics in both private and public education and health sectors.

<sup>101</sup> Alsaad24 (2024), 'سليمان: أعداد السودانيين القادمين إلى "الكفرة" في تزايد... والإمكانيات محدودة' [Suleiman: The number of Sudanese coming to Kufra is increasing. And the possibilities are limited], 23 January 2024, [https://www.alsaad24.com/2024/01/23/سليمان-أعداد-السودانيين-القادمين-إلى-الكفرة-في-تزايد...-والإمكانيات-محدودة/?fbclid=IwZXh0bgNhZW0CMTEAAR3vIE-eg-XP3\\_XOBkWdrdXvEQEHLTD0rEClqrdg\\_35BlaBOQubRTfEva8\\_aem\\_AcozuWKJUVtAWSU4HLF1wQJMcnH1JzW1QwcWBS308\\_OvcU8kiK9oafJQEWrbBaFXJ95ahrZ2LVcngn39wTj8Xpfy](https://www.alsaad24.com/2024/01/23/سليمان-أعداد-السودانيين-القادمين-إلى-الكفرة-في-تزايد...-والإمكانيات-محدودة/?fbclid=IwZXh0bgNhZW0CMTEAAR3vIE-eg-XP3_XOBkWdrdXvEQEHLTD0rEClqrdg_35BlaBOQubRTfEva8_aem_AcozuWKJUVtAWSU4HLF1wQJMcnH1JzW1QwcWBS308_OvcU8kiK9oafJQEWrbBaFXJ95ahrZ2LVcngn39wTj8Xpfy).

<sup>102</sup> Libya Review (2024), 'WFP Seeks \$14.1 Million to Address Food Insecurity & Poverty in Libya', 11 May 2024, <https://libyareview.com/44102/wfp-seeks-14-1-million-to-address-food-insecurity-poverty-in-libya>; The municipality estimates the number at some 15,000, while local health authorities put it at closer to 50,000, see: Agenzia Nova (2024), 'Libia: emergenza umanitaria a Kufra per l'arrivo di migliaia di sfollati dal Sudan [Libya: humanitarian emergency in Kufra due to the arrival of thousands of displaced people from Sudan]', 16 April 2024, <https://www.agenzianova.com/news/libia-emergenza-umanitaria-a-kufra-per-larrivo-di-migliaia-di-sfollati-dal-sudan>.

<sup>103</sup> Agenzia Nova (20224), 'Libya, the IOM on "Nova" on the migration crisis in Kufra: We are in coordination with the UN', 31 January 2024, <https://www.agenzianova.com/en/news/libia-loim-responds-to-nova-on-the-migration-crisis-in-kufra-we-are-in-coordination-with-lonu>.

<sup>104</sup> Eaton, T. (2023), 'Stability at what cost? Smuggling-driven development in the Libyan city of Kufra', Chatham House Expert Comment, 10 February 2023, <https://www.chathamhouse.org/2023/02/stability-what-cost-smuggling-driven-development-libyan-city-kufra>.

<sup>105</sup> Field research interviews conducted in Kufra, southern Libya, December 2023.

Many refugees and migrants have also ended up working in artisanal gold mining in southeast Egypt, where the Egyptian government has been systematically developing ASGM since 2020 as a way of bolstering the economy, taking advantage of the expertise of Sudanese workers. But miners work long hours in harsh conditions with a high incidence of accidents causing injury and death.<sup>106</sup> The money they receive is dependent on how much gold is extracted in a trip, ranging from 800 to 2,500 Egyptian pounds (\$15–\$50).<sup>107</sup> Contestation over mining areas has led to clashes between local Egyptian producers, militant community groups and state security services, with Sudanese workers caught in the middle. Local communities have formed militias to extract gold and protection fees from the miners, and in June and July 2023 miners were attacked by state forces, and dozens deported to Sudan.

### ‘Outside-in’

‘Outside-in’ dynamics, by contrast, refer to the ways that actors and processes (political, military, economic or ideological) from beyond national borders impact local or national conflict. In these terms, Sudan’s war is a regional one, with the Gulf states, notably the UAE, Saudi Arabia and Qatar, as well as other states such as Egypt and Türkiye, influencing the conflict through support to one or other warring party, in pursuit of their own interests. Gold has become a key element in motivating and conditioning the actions of external players to Sudan’s conflict.

### Support for the SAF – Egypt’s economic imperative

Egypt historically has a strong influence in Sudan and deep military and economic ties with the SAF. Egypt has consistently backed the SAF’s commander General Abdel Fattah al-Burhan,<sup>108</sup> despite concerns about the hold that hardline Islamists have over the SAF and the possibility of future extremism across its southern border – especially with over a million Sudanese having crossed the border into Egypt.<sup>109</sup> Despite its hostility to the Egyptian Muslim Brotherhood, the government of President Abdel Fattah El-Sisi continues to host Sudanese Islamists and prominent former members of the Bashir regime, including ex-intelligence chief Salah Gosh. Egypt is also home to numerous Sudanese politicians and provided a platform to the so-called Democratic Bloc, a group that supported the coup against Sudan’s legitimate civilian government in October 2021.<sup>110</sup> Since the start of a major SAF offensive in September 2024, Egypt appears to have reinforced its political and military support.<sup>111</sup>

Egypt’s tolerance for these political actors may in part be due to an economic imperative. The blockade and closure of port facilities in Port Sudan in 2021, added further economic and political pressure to the civilian government, which

<sup>106</sup> Field research interviews conducted in Aswan, southern Egypt, with Sudanese mining workers under the condition of anonymity, August 2024.

<sup>107</sup> Hagag, M. and Higazy, M. (2023), ‘The Gold War’, Mada MSR, 16 August 2023, <https://www.madamasr.com/en/2023/08/16/feature/politics/the-gold-war>.

<sup>108</sup> Research interview with Egyptian official, under the condition of anonymity, October 2024.

<sup>109</sup> Dabanga Sudan (2024), ‘New Sudan FA minister meets with Egyptian counterpart’, 8 November 2024, <https://www.dabangasudan.org/en/all-news/article/new-sudan-fa-minister-residing-in-cairo-meets-with-egyptian-counterpart>.

<sup>110</sup> Cairo also hosts pro-democracy politicians and civil society organizations and has sought to play a role in reconciling competing civic groups.

<sup>111</sup> Ayin Network (2024), ‘Egypt’s intervention in Sudan’s War’, 27 December 2024, <https://3ayin.com/en/egyptsaf>.

paved the way for the military coup. This action also contributed to Sudan's deepening economic dependence on Egypt, as many traders and importers turned to Egyptian ports in the Red Sea for transshipments to Sudan.<sup>112</sup> In return, the Egyptian government made facilities available for trade operations, and importers benefited from faster processing at Egyptian ports compared to Port Sudan.<sup>113</sup> Since the outbreak of the war, some tankers have been reluctant to stop at Port Sudan, instead supplies are brought in from Ain Sokhna port in Egypt.

It is gold, however, that has perhaps been the most important economic factor in the bilateral relationship. Egypt has profited substantially from conflict gold smuggled from SAF-held areas, as well as the expansion of ASGM in southern Egypt. The importance of gold to Egypt increased from 2020 to 2023 due to worsening economic conditions, sharpened by a balance of payments crisis, which the Egyptian authorities attempted to correct by unifying the official and parallel exchange rates.<sup>114</sup> The country also sought to reinforce its currency and increase its access to foreign exchange by expanding gold reserves.

Figure 4 illustrates that gold reserves in the Central Bank of Egypt remained under 80 tonnes until 2020.<sup>115</sup> Egypt produces only a relatively modest amount of gold domestically, behind the top gold producers in Africa such as Ghana and South Africa,<sup>116</sup> with only 15.8 tonnes of gold in 2023,<sup>117</sup> yet was still able to increase its gold reserves by more than 50 per cent in 2022, to 125 tonnes.<sup>118</sup>

However, official figures show that Egypt added only 1.25 tonnes to its gold reserves in 2023 and 2024, compared to the 45 tonnes added in 2022, before the Sudanese war started.<sup>119</sup> The limited official increase in gold reserves over the last two years, despite research indicating that upwards of 60 tonnes of Sudanese gold was smuggled to Egypt between April 2023 and the end of 2024,<sup>120</sup> suggests that most of the gold entering the Egypt market from Sudan during the war has done so through illicit channels. In part, this was the reason the Egyptian government removed import duties for gold in May 2023. This has facilitated the entry of Sudanese gold into Egypt across its northern borders and led to a revival of cross-border smuggling.

<sup>112</sup> Elthair, N., Abdelaziz, K. and Saul, J. (2021), 'Sudan's Red Sea port struggles to recover from blockade and turmoil', Reuters, 23 December 2021, <https://www.reuters.com/markets/commodities/sudans-red-sea-port-struggles-recover-blockade-turmoil-2021-12-23>.

<sup>113</sup> Most goods transit through the Qastal dry port on the Egyptian side of the border, or Sudan's Wadi Halfa port on the eastern bank of the Nile.

<sup>114</sup> International Crisis Group (2023), 'Egypt in the Balance?', 31 May 2023, <https://www.crisisgroup.org/middle-east-north-africa/north-africa/egypt/egypt-in-the-balance>.

<sup>115</sup> Isaga (2024), 'مجلس الذهب العالمي: المركزي المصري يرفع حيازته من الذهب إلى 126.2 طن', [World Gold Council: Central Bank of Egypt raises its gold holdings to 126.2 tons], 14 February 2024, [https://market.isagha.com/articles/996#google\\_vignette](https://market.isagha.com/articles/996#google_vignette).

<sup>116</sup> World Gold Council (2024), 'Global mine production', <https://www.gold.org/goldhub/data/gold-production-by-country>.

<sup>117</sup> Ahram Online (2024), 'Egypt's gold reserves at mines hit 25 mln ounces', 10 January 2024, <https://english.ahram.org.eg/News/515419.aspx>.

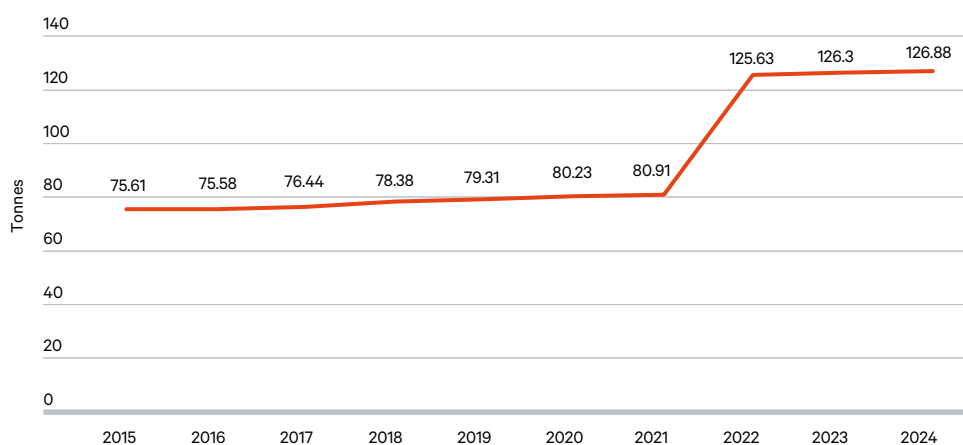
<sup>118</sup> Al Masry Al Yom (2023), 'Egypt ranks 3rd globally in gold reserves', Egypt Independent, 9 February 2023, <https://www.egyptindependent.com/egypt-ranks-3rd-globally-in-gold-reserves/#:~:text=Farag%20added%2C%20during%20a%20telephone,an%20increase%20of%2045%20tons>.

<sup>119</sup> Isaga (2024), '[World Gold Council: Central Bank of Egypt raises its gold holdings to 126.2 tons]'.

<sup>120</sup> Research interview with senior Sudanese economist and expert on strategic commodities, under the condition of anonymity, 27 September 2024; research interview with Sudanese gold producer, under the condition of anonymity, 25 October 2024.

It can be assumed that Sudanese gold is contributing to Egypt’s substantial earnings from exporting gold in recent years, with much of this sold to the UAE. UN trade data show that total Egyptian exports of gold were in excess of \$1.8 billion in 2023, with over \$1 billion worth of gold (55 per cent of total exports) sold to the UAE. In the first 10 months of 2024, Egypt’s total gold exports were worth over \$2.6 billion, with over \$1.6 billion sold to the UAE (nearly 26 tonnes).<sup>121</sup>

**Figure 4.** Egyptian official gold reserves 2015–24



Source: World Gold Council (2025), ‘Gold Reserves by Country’, 7 February 2025, <https://www.gold.org/goldhub/data/gold-reserves-by-country>.

Sudanese officials seem aware of the large-scale smuggling of their country’s gold to its northern neighbour but remain unable to take decisive action to stop the outflow. In a statement to the local media, Finance Minister Gibril Ibrahim disclosed during a visit to the Northern state in early March that officials from a ‘neighbouring country’ – a clear reference to Egypt – informed him that 48 tons of Sudanese gold had entered their country in 2024 alone.<sup>122</sup>

Other countries supportive of the SAF-led Port Sudan authorities, such as Türkiye and Qatar, have also been hosting Islamist former members of the Bashir regime, who are crucial to providing the financial networks, weapons and military equipment needed for the SAF’s war effort.<sup>123</sup> There are suggestions that the SAF has sought to sell gold through these networks in Türkiye and Qatar, with varying degrees of success.<sup>124</sup>

<sup>121</sup> In 2023, Egypt exported 29.83 tonnes of gold in total, with a value of \$1.83 billion. Of this amount, 16.48 tonnes were exported to the UAE, with a value of \$1 billion, amounting to 55 per cent of Egypt’s gold exports. In the first 10 months of 2024, Egypt exported 41.14 tonnes of gold in total, with a value of \$2.06 billion. Of this amount, 25.86 tonnes were exported to the UAE, with a value of \$1.65 billion, amounting to 62.85 per cent of Egypt’s gold exports. UN Comtrade data (2024), ‘Egyptian gold exports in 2023 and 2024’, United Nations Statistics Division, <https://comtradeplus.un.org/TradeFlow> (accessed 17 Mar. 2025).

<sup>122</sup> Sudan Peace Tracker (2025), ‘The Mystery of the Missing \$2.3 Billion: How Gold Funds Sudan’s War’.

<sup>123</sup> Ayin Network (2025), ‘Sudan’s army: More military upgrades, alliances – more war ahead’, 19 March 2025, <https://3ayin.com/en/safjets>.

<sup>124</sup> Information provided by participant at Chatham House workshop on Sudan’s war economy, 14–15 August 2024.

While not directly linked to the gold trade, the re-establishment of diplomatic ties with Iran has been crucial to the Port Sudan authorities, especially in terms of providing Iranian Mohajer-6 drones to the SAF in 2024, which have been crucial for the SAF's efforts to reverse the RSF's gains in the capital and central Sudan.<sup>125</sup> Finance Minister Gibril Ibrahim visited Tehran in November 2024 to further strengthen cooperation.<sup>126</sup> Gibril also has close links with the Muslim Brotherhood in Qatar, which has a history of engagement on mediation in Sudan, notably sponsoring the Doha Document for Peace in Darfur in 2011.

Support from Egypt and other regional players has been crucial for the SAF to continue the war. This assistance is likely heavily predicated on Cairo's appetite for Sudanese gold as well as the SAF's ability to finance arms purchases with gold revenue. Consequently, the SAF has been under pressure from its Islamist backers not to participate in international negotiations and to continue to seek a military victory.<sup>127</sup>

However, the SAF's dependence on gold has also constrained its ability to marshal diplomatic and security support for its war against the RSF, notably through its strained relationship with the UAE. Although there is a growing diplomatic rift between the SAF and the UAE over the latter's support for the RSF, Port Sudan is also aware of its economic dependency on Emirati financial channels and gold exports, necessitating an intricate balancing act between political tensions and financial pragmatism.

The SAF's Assistant Commander Lieutenant General Yasir al-Atta has repeatedly denounced the UAE for providing military and logistical support to the RSF in its war against the SAF.<sup>128</sup> During his frequent garrison tours, al-Atta routinely attacked the UAE's leadership, using inflammatory language.<sup>129</sup> This animosity escalated in December 2023 when Sudan's foreign ministry expelled 15 members of the UAE delegation based in Port Sudan, and peaked in June 2024 when Sudan presented alleged evidence to the UN Security Council that the UAE was backing the RSF, which the UAE vehemently denied.<sup>130</sup> Tensions have remained high, and in March 2025, the Port Sudan authorities filed proceedings against the UAE at the International Court of Justice, accusing the UAE of complicity in genocide due to its backing of the RSF.<sup>131</sup>

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<sup>125</sup> Information provided by participant at Chatham House workshop on Sudan's war economy, 14–15 August 2024. See also Human Rights Watch (2024), *Fanning the Flames: Sudanese Warring Parties' Access To New Foreign-Made Weapons and Equipment*, New York City: Human Rights Watch, [https://www.hrw.org/sites/default/files/media\\_2024/09/sudan\\_weapons\\_0924\\_briefing-FINAL-web.pdf](https://www.hrw.org/sites/default/files/media_2024/09/sudan_weapons_0924_briefing-FINAL-web.pdf); Conflict Observatory (2024), *Foreign Facilitators of Weapons Fuelling Sudan's Civil War*, US: Conflict Observatory, <https://hub.conflictobservatory.org/portal/apps/sites/#/sudan>.

<sup>126</sup> Suna Sudan (2024), 'Finance Minister meets Iranian Foreign Minister in Tehran', 9 November 2024, <https://suna-sd.net/posts/finance-minister-meets-iranian-foreign-minister-in-tehran>.

<sup>127</sup> Ayin Network (2024), 'More weapons embolden Sudan's army to reject critical peace talks', 26 August 2024, <https://3ayin.com/en/arms-2>.

<sup>128</sup> Eltahir, N. (2023), 'Sudanese general accuses UAE of supplying paramilitary RSF', Reuters, 28 November 2023, <https://www.reuters.com/world/africa/sudanese-general-accuses-uae-supplying-paramilitary-rsf-2023-11-28>.

<sup>129</sup> Radio Tamazuj (2024), 'General Al-Atta accuses UAE President of role in Sudan war', 21 March 2024, <https://www.radiotamazuj.org/en/news/article/general-al-atta-accuses-uae-president-of-role-in-sudan-war>.

<sup>130</sup> Besheer, M. (2024), 'Sudan, UAE envoys clash at UN', Voice of America, 18 June 2024, <https://www.voanews.com/a/sudan-uae-envoys-clash-at-un-/7661101.html>.

<sup>131</sup> International Court of Justice (2025), 'Sudan institutes proceedings against the United Arab Emirates and requests the Court to indicate provisional measures', press release, 6 March 2025, <https://www.icj-cij.org/case/197>.

However, despite the escalating rhetoric, General Burhan has refrained from openly criticizing the UAE, recognizing the financial leverage the UAE holds over Sudan. The de facto government of Sudan relies heavily on the UAE to clear international trade transactions and secure vital imports like fuel and consumer goods. The Port Sudan authorities depend mainly on the Abu Dhabi branch of the state-owned El-Nilein Bank to manage international transactions, a critical asset considering Sudan's post-coup international isolation. Similarly, the UAE-based Dubai Islamic Bank, and other Emirati banks and investors, have a significant stake in the Bank of Khartoum, the largest commercial bank in Sudan, whose digital platform, Bankak, facilitates money transfers for millions of displaced Sudanese and public institutions. Any disruption in the Bank of Khartoum's operations due to diplomatic fallout would have severe consequences for the SAF and the public sector.

## The Port Sudan authorities have attempted to overcome the constraints in selling gold to the UAE by moving production from SAF-controlled areas through Egypt, as well as finding alternative markets for its gold, notably seeking to persuade Qatar to build a refinery for Sudanese gold exports.

Furthermore, in April 2024, Gibril Ibrahim, confirmed that despite diplomatic tensions with the UAE, gold from areas controlled by the Port Sudan authorities is still partly exported to Dubai, at the insistence of some private sector exporters. These exporters and producing companies prefer Dubai as a destination because of long-established relationships and the availability of finance from the UAE's economic hub to purchase essential goods that can then be imported to Sudan.

Reporting from the SMRC indicates that of the 2 tonnes of declared gold produced between April and August 2023 (in SAF-held areas), 1.8 tonnes were exported to Dubai.<sup>132</sup> More notably, UN trade data shows that Emirati imports of gold from Sudan remained substantial following the outbreak of war. In 2023, the UAE was reported to have imported 17 tonnes of gold from Sudan, with a value in excess of \$1 billion.<sup>133</sup> Even more notably, the Central Bank of Sudan reported that in 2024 almost 97 per cent of official gold exports (from SAF-held areas) were to the UAE,

<sup>132</sup> Suleiman, D. (2023), '(90%)', 'ابوظبي تستورد (90%)... طن صدرت في الربع الأول من العام 2024 م... ابيوطبي تستورد (90%)', 'Exports to the Emirates are still ongoing... من إنتاج الذهب خلال عام الحرب... (11) سبيكة تابعة لشركة المنجز في أسواق ابوظبي خلال مارس (6.3) tons were exported in the first quarter of 2024 AD... Abu Dhabi imports (90%) of gold production during the war year... (11) ingots belonging to Al-Manjaz Company in Abu Dhabi markets during March', *Alsaa 24 News Network*, 3 May 2024, <https://alsaa24.net/> بالارقام-الذهب-السوداني-التصدير-لام

<sup>133</sup> According to UN Comtrade data, Sudanese gold exports to the UAE between 2019 and 2023 were: 2019, 27.45 tonnes, valued at \$1.17 billion; 2020, 33.08 tonnes, valued at \$1.77 billion; 2021, 50.64 tonnes, valued at \$2.82 billion; 2022, 38.96 tonnes, valued at \$2.29 billion; 2023, 17.00 tonnes, valued at \$1.03 billion. Gold imports to the UAE are likely to include gold produced in RSF-controlled areas, as well as gold smuggled to the UAE from SAF-held areas, including off-the-books exports by the SAF and its business allies. UN Comtrade data (2024), 'UAE gold imports from Sudan between 2019 and 2023', United Nations Statistics Division, <https://comtradeplus.un.org/TradeFlow> (accessed 20 Jan. 2025).

earning \$1.52 billion.<sup>134</sup> Moreover, this figure accounts for 48.5 per cent of Sudan's total exports in 2024,<sup>135</sup> which reinforces the economic reliance of the SAF on Dubai and the UAE for resources that enable the continuation of the war.

Indeed, high-level Emirati investors own some of Sudan's most productive gold companies, such as Emiral Resources Limited,<sup>136</sup> owner of Kush for Exploration and Production Co. Ltd., which established Alliance for Mining Co. in 2014. According to a 2020 SMRC annual report, Alliance for Mining Co. was the leading franchise company that year, producing 2.97 tonnes of gold.<sup>137</sup> Following the outbreak of the war, Alliance for Mining Co. emerged as one of the leading companies selling its gold production to the SAF-led Port Sudan authorities, further highlighting Port Sudan's critical role in Sudan's gold industry and its complex ties to both domestic and foreign power players.<sup>138</sup>

The Port Sudan authorities have attempted to overcome the constraints in selling gold to the UAE by moving production from SAF-controlled areas through Egypt,<sup>139</sup> as well as finding alternative markets for its gold, notably seeking to persuade Qatar to build a refinery for Sudanese gold exports.<sup>140</sup> Port Sudan has struggled to find an alternative destination for Sudan's gold, although in March 2025, they jointly announced with Qatari authorities the launch of a new investment entity that would be reliant on gold, including the establishment of a refinery in Doha for Sudanese gold.<sup>141</sup>

### Support for the RSF – all roads lead to the UAE

During the transitional government period, the RSF developed its own autonomous external relations. Prior to this, in 2013–19, the RSF also pursued joint external relations with the SAF. Notably, commanders of both forces frequently travelled to Saudi Arabia and the UAE to coordinate the deployments of their fighters in the war against the Houthis in Yemen as of 2015. Following Bashir's fall, Burhan and RSF leader Hemedti conducted joint state visits at times as the chairman and deputy chairman of the Transitional Sovereignty Council.

Ultimately, Hemedti sought to reinforce the RSF's position as a competing centre of power by conducting state visits on his own. The RSF command maintained close diplomatic relations with leaders in neighbouring countries including Chad, Ethiopia, Kenya and Uganda – with political and economic interests intersecting. Hemedti also cultivated relations with Russia, visiting Moscow at the time it launched the war against Ukraine.<sup>142</sup> Saudi Arabia and the UAE were both important stakeholders for the RSF, as Hemedti sought to build his external

<sup>134</sup> Central Bank of Sudan (2024), 'Foreign Trade Statistical Digest, January – December 2024'.

<sup>135</sup> Ibid.

<sup>136</sup> Walsh (2024), 'The Gold Rush at the Heart of a Civil War'.

<sup>137</sup> SMRC Annual Report for 2020, p. 17, received in hard copy.

<sup>138</sup> In communication with Emiral Resources Limited, the company has confirmed that it does not have any connection to Sudan's conflict.

<sup>139</sup> Abdelrahman (2023), *Sudan's Other War*.

<sup>140</sup> Al Taghyeer (2024), 'Sudan and Qatar agree to build gold refinery in Doha', 1 May 2024, <https://www.altaghyeer.info/en/2024/05/01/sudan-and-qatar-agree-to-build-gold-refinery-in-doha>.

<sup>141</sup> Qatar Chamber (2025), 'Economic Entity Launched to Enhance Private Sector Investments Between Qatar and Sudan', 10 March 2025, <https://www.qatarchamber.com/qatar-sudan-private-sector-investment>.

<sup>142</sup> Elbagir et al. (2022), 'Russia is plundering gold in Sudan'.

legitimacy. And shortly before the 2021 coup, the RSF's second in command Abdelrahim Dagalo visited Israel as part of a military delegation to strengthen relations following Sudan's signing of the Abraham Accords.<sup>143</sup>

The most notable backer of the RSF has been the UAE, a claim the UAE continues to publicly deny despite mounting evidence to the contrary, including by the UN Panel of Experts on Sudan.<sup>144</sup> The majority of Sudan's gold exports end up in the UAE, which is the dominant destination for licit and illicit gold flows from across Africa. The trade has continued during the war.<sup>145</sup> In 2024, the UAE was Sudan's biggest export market, with exports worth \$1.6 billion (over 91 per cent of which was gold), making up over 53 per cent of all exports from Sudan.<sup>146</sup> In return the UAE is reported to have supplied sophisticated weapons (drones, anti-aircraft missiles, mortars and ammunition) to sustain the RSF's war effort.<sup>147</sup>

## The UAE's power projection in the region

The UAE's interests in Sudan are shaped by multiple factors, including gold, Red Sea maritime security, food security and commercial interests. In this context, the UAE has expressed concerns over the Sudan revolution and the civilian political transition from 2019, as well as the revival of political Islam in Sudan since the war began. The UAE's transactional approach to Sudan is the result of highly centralized, personality-driven and securitized decision-making structures,<sup>148</sup> which should be assessed through the lens of growing Emirati assertiveness elsewhere on the continent and emergence as a middle-order power.

The UAE's foreign policy approach across Africa has evolved over the last decade, following its support for the Saudi-led coalition's war in Yemen from 2015, in which Sudanese forces from both the RSF and the SAF participated. Security entanglements in Yemen and Libya have sharpened the UAE's engagement across the Red Sea. The UAE has also sought to sustain its position as a leading logistics hub and maritime power, with the aim of ensuring that Jebel Ali port in Dubai remains a strategic hub connecting Asian, African and global markets, through the Red Sea and Suez Canal, a vital maritime chokepoint handling 12 per cent to 15 per cent of global trade.<sup>149</sup>

<sup>143</sup> Middle East Eye (2021) 'Sudan coup: Israeli delegation visited country in midst of takeover', 2 November 2021, <https://www.middleeasteye.net/news/sudan-coup-israel-delegation-visited-sudan-midst-takeover>.

<sup>144</sup> UN Panel of Experts on the Sudan (2024), *Final report of the Panel of Experts on the Sudan*. See also Conflict Observatory (2024), *Foreign Facilitators of Weapons Fuelling Sudan's Civil War*; Human Rights Watch (2024), *Fanning the Flames*; Walsh, D. and Koettl, C. (2024), 'How a U.S. Ally Uses Aid as a Cover in War', *New York Times*, 29 September 2024, <https://www.nytimes.com/2023/09/29/world/africa/sudan-war-united-arab-emirates-chad.html>.

<sup>145</sup> See Ummel, M. and Schulz, Y. (2024), *On the trail of African gold: Quantifying production and trade to combat illicit flows*.

<sup>146</sup> Central Bank of Sudan (2024), 'Foreign Trade Statistical Digest, January – December 2024'.

<sup>147</sup> See Conflict Observatory (2024), *Foreign Facilitators of Weapons Fuelling Sudan's Civil War*; Human Rights Watch (2024), *Fanning the Flames*.

<sup>148</sup> Horner, J. and Soliman, A. (2023), *Coordinating international responses to Ethiopia–Sudan tensions*, Research Paper, London: Royal Institute of International Affairs, <https://doi.org/10.55317/9781784135669>.

<sup>149</sup> UNCTAD (2024), 'Red Sea, Black Sea and Panama Canal: UNCTAD raises alarm on global trade disruptions', press release, 26 January 2024, <https://unctad.org/news/red-sea-black-sea-and-panama-canal-unctad-raises-alarm-global-trade-disruptions>.

Africa's emerging importance to the UAE is part of its vision for global economic diversification and interconnectedness. This includes a transport corridor (combining economic, security and political interests), stretching from East Africa across the Sahel to West Africa – with state and non-state actors in countries such as Sudan, Chad, Ethiopia and Libya forming part of the Gulf state's second tier relationships and interests. This strategy has been enhanced partly due to the UAE's growing competition with Saudi Arabia, the Gulf's traditional hegemon and neighbour on the Red Sea, which is undergoing its own accelerating economic diversification, under Saudi Crown Prince Mohammed bin Salman's 'Vision 2030' policy.<sup>150</sup>

Gold is a significant contributor to the UAE's post-carbon economic and security horizons. The UAE, and specifically Dubai, is one of the main hubs for the global gold trade, with multiple gold refineries and thousands of traders in precious metals and stones. A SwissAid report from 2024 highlights the importance of African gold to the UAE, with Emirati statistics showing that annual gold imports from Africa to the UAE more than doubled between 2012 and 2022, from 243 tonnes to 609 tonnes.<sup>151</sup> In 2022, the UAE reported importing 1,059 tonnes of gold (with a value of \$59.5 billion) – with gold from Africa accounting for 58 per cent of the total gold imported into the UAE, with a trade value of \$34.5 billion.<sup>152</sup> Significantly, this means that African gold accounted for nearly 7 per cent of the UAE's GDP (\$502.7 billion) in 2022.<sup>153</sup>

The UAE's role as a major hub for smuggled gold is well established. Between 2012 and 2022, the UAE imported 2,569 tonnes of gold from Africa that was not declared for export from African countries, amounting to \$115.3 billion.<sup>154</sup> The UAE's due diligence regulation for the gold sector, the UAE Good Delivery Standard, has become more rigorous but remains non-binding since its inception in 2021.<sup>155</sup> However, there have been improvements, with 32 gold refineries suspended in 2024 for failing to follow anti-money laundering laws.<sup>156</sup> Yet the UAE continues to benefit from Sudan's conflict gold – as the enforcement of restrictions on artisanal gold imports from countries where there is war or where gold is controlled by armed groups remains limited.

<sup>150</sup> Which envisions new cross-border infrastructure projects, including land transport projects with Africa through Egypt. Kingdom of Saudi Arabia (2016), *Saudi Vision 2030*, Riyadh: Kingdom of Saudi Arabia, [https://www.vision2030.gov.sa/media/rc0b5oy1/saudi\\_vision203.pdf](https://www.vision2030.gov.sa/media/rc0b5oy1/saudi_vision203.pdf).

<sup>151</sup> Ummel and Schulz (2024), *On the trail of African gold*, p.38.

<sup>152</sup> Ibid. However, in 2023 this figure fell to 397 tonnes (with a value of \$23.9 billion). Workman, D. (undated), 'Gold Imports by Country', World's Top Exports, <https://www.worldstopexports.com/international-markets-for-imported-gold-by-country>.

<sup>153</sup> IMF DataMapper (2024), 'GDP, current prices > United Arab Emirates', <https://www.imf.org/external/datamapper/NGDPD@WEO/ARE?zoom=ARE&highlight=ARE> (accessed 20 Nov. 2024).

<sup>154</sup> Ummel and Schulz (2024), *On the trail of African gold*.

<sup>155</sup> Küçükemiroğlu, C. (2022), *Spotlight on the UAE*, London: LBMA, <https://cdn.lbma.org.uk/downloads/Publications/2022/LBMA-Spotlight-on-the-UAE.pdf>.

<sup>156</sup> Nair, D. (2024), 'UAE suspends 32 gold refineries in anti-money laundering crackdown', The National, 8 August 2024, <https://www.thenationalnews.com/business/money/2024/08/08/uae-gold-refineries-anti-money-laundering>; Pope, H. (2024), 'UAE Suspends 32 Gold Refineries in Anti-Money Laundering Investigation', OCCRP, 9 August 2024, <https://www.occrp.org/en/news/uae-suspends-32-gold-refineries-in-anti-money-laundering-investigation>.

## Competing external influences

The UAE and Egypt emerge from this analysis as the external actors with the greatest direct ‘outside-in’ influence over Sudan’s contemporary conflict dynamics, relationships that are in both cases heavily reliant on gold. However, these actors are not simply trying to maintain and maximize access to and profit from Sudan’s gold, they are also enmeshed in wider regional and global political, economic and security dynamics, seeking to boost their influence and strengthen their positions in relation to each other and other regional powers. This has been most visible in the emerging competition between the UAE and Saudi Arabia for regional primacy.

The UAE has sought to influence Sudan’s neighbours to support its interests in the country through chequebook diplomacy, through deals with Chad, South Sudan and Ethiopia, including investments or military cooperation agreements. It has also sought to leverage its influence over Egypt, which is economically dependent on both the UAE and Saudi Arabia. The announcement in February 2024 of the UAE’s \$35 billion investment in Egypt’s Ras El Hekma real estate development coincided with an evolution of regional mediation efforts, following on from Egypt and the UAE co-facilitating high-level SAF–RSF talks in Manama, Bahrain, in January, alongside the US and Saudi Arabia.<sup>157</sup> At the time, there were signs that Egypt might moderate its backing for Burhan, given the growing sense that a complete SAF victory was unlikely.

## The UAE has sought to influence Sudan’s neighbours to support its interests in the country through chequebook diplomacy, through deals with Chad, South Sudan and Ethiopia.

For its part, Saudi Arabia is seen as a more neutral player in the war, having hosted two rounds of talks in Jeddah in 2023, which resulted in the Jeddah Declaration.<sup>158</sup> Despite subsequent efforts to widen the mediation to include other regional actors, Saudi Arabia continues to be protective over the ceasefire process, seeking to ensure that it hosts and receives credit for any future agreement.<sup>159</sup> This position is shaped by Saudi Arabia’s desire to be a regional peacemaker, as well as its rivalry with the UAE. There remains Saudi discomfort at the prospect of a future Emirati foothold on the Red Sea, via a Sudanese port.<sup>160</sup> The Saudi leadership is also

<sup>157</sup> Alnaser, H., Idris, M. and al-Faroug, O. (2024), ‘Sudan Nashra: Burhan rejects outcomes of Manama talks | Khartoum engulfed in battle | Sudanese-Algerian rapprochement’, Mada MSR, 2 February 2024, <https://www.madamasr.com/en/2024/02/02/news/u/sudan-nashra-burhan-rejects-outcomes-of-manama-talks-khartoum-engulfed-in-battle-sudanese-algerian-rapprochement>.

<sup>158</sup> The declaration is a set of principles framed in international humanitarian law that focused on humanitarian access and protection of civilians, which both sides have failed to implement. It remains viable as the only document agreed that holds the warring parties to account for their actions. See US Department of State, Bureau of African Affairs (2023), ‘Jeddah Declaration of Commitment to Protect the Civilians of Sudan’, other release, 11 May 2023, <https://www.state.gov/jeddah-declaration-of-commitment-to-protect-the-civilians-of-sudan>.

<sup>159</sup> Research interview with senior US diplomat, under the condition of anonymity, 13 December 2024.

<sup>160</sup> Research interview with an independent researcher focused on the Gulf region, under the condition of anonymity, Doha, 9 December 2024.

more inclined to engage state actors, with the suggestion of a leaning towards the SAF, as the perceived de facto state actor, which is reinforced by the UAE's support for the RSF.

Egypt, the UAE and Saudi Arabia all participated in US-sponsored talks in Geneva in August 2024, subsequently forming part of the Aligned for Advancing Lifesaving and Peace in Sudan group. However, this platform ultimately focused on trust-building and ensuring traction on the delivery of humanitarian assistance, and was not able to navigate ceasefire talks or change the calculations of the regional backers of the warring parties. Subsequently, a narrower diplomatic 'quartet' emerged including Egypt, Saudi Arabia, the UAE and US – which is seen as encompassing the key players who can exert leverage on the warring parties.

Limited high-level US diplomatic engagement on Sudan during the Biden administration was due to the civil war's relatively low political salience in Washington, given the long list of simultaneous global crises. This led to an unwillingness to overtly pressure the UAE or Egypt on Sudan due to their key roles in resolving other conflicts in the Middle East, such as the Gaza crisis, which were deemed a higher priority. To an extent, the lack of strategic coordination between the US and other major Western allies on Sudan left the former US envoy, Tom Perriello, isolated.

Multiple US sanctions on Sudan's main warring parties, particularly on the RSF, including Hemedti in early 2025, have in part sought to expose and disrupt the network of companies and illicit financial flows that have bolstered the RSF's fighting capacity, particularly in the gold sector.<sup>161</sup> This includes several companies based in the UAE, and these measures can be seen as the US putting subtle pressure on the country to lessen its support for the RSF. The Biden administration resisted openly admonishing the UAE for its role in Sudan despite significant pressure from congress for it to do so. In fact, the US strengthened its strategic and defence partnership with the UAE during President Mohamed bin Zayed's visit to Washington in September 2024. On Sudan, the communique only noted a 'shared commitment to de-escalate the conflict',<sup>162</sup> illustrating how far down Sudan is on the priority list.

It remains to be seen how the Trump administration will engage on Sudan, but the US is expected to be selective and transactional in its engagement in Africa. Sudan policy will likely be shaped by US strategic interests in the Middle East, especially the economic and security concerns of the UAE and Saudi Arabia, and how these relate to President Trump's desire to secure a ceasefire in Gaza and broaden the Abraham Accords.

<sup>161</sup> US Department of the Treasury (2025), 'Treasury Sanctions Sudanese Paramilitary Leader, Weapons Supplier, and Related Companies', press release, 7 January 2025, <https://home.treasury.gov/news/press-releases/jy2772>.

<sup>162</sup> The White House (2024), 'U.S.-UAE Joint Leaders' Statement Dynamic Strategic Partners', press release, 23 September 2024, <https://www.whitehouse.gov/briefing-room/statements-releases/2024/09/23/u-s-uae-joint-leaders-statement-dynamic-strategic-partners>.

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# Conclusion and policy implications

**Policymakers seeking peace in Sudan must engage with how the region shapes the conflict. A robust international coalition is needed to advance regional solutions for ending the war, including factoring in gold as a vehicle for power in Sudan and beyond.**

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## Understanding the relevance of the regional conflict ecosystem for effective policy

This paper argues that gold is a major driver of the war in Sudan and will continue to shape the evolution of the conflict. The multi-billion-dollar sector provides the most significant source of income for the SAF and the RSF, and it feeds an associated cross-border network of actors including other armed groups, producers, traders, smugglers and external governments. The political, military, economic, social and ideological linkages in this transnational conflict supply chain are frequently contested and in flux, which consequently fuels the war.

The Gulf states, notably the UAE and Saudi Arabia, as well as other regional powers such as Egypt, have had a significant influence on Sudan's conflict in pursuit of their own interests. Sudan's porous borders with neighbouring countries including Chad, Libya and South Sudan, have also further enabled war efforts through the smuggling of gold and the import of materials necessary to support both mining and continued fighting. Sudan's gold sector links the country to distant geographies as part of a regional conflict ecosystem, in which authority and violence are not confined to nation-state borders. Such economic processes not only connect Sudan to its region, but they facilitate the supply chains that fuel and sustain the conflict.

This has three key implications for policymaking and development programming. First, Sudan's gold sector and its intersecting networks – of military, economic and political authority – extend their influence beyond the nation-state. As a result, policy or programming responses cannot be merely country-specific, because the boundaries of the conflict are not. Policy solutions that are only focused on Sudan will struggle to navigate the broader ecosystem in which the conflict

operates. Targeting only one part of this ecosystem, for instance by sanctioning a specific company trading in conflict gold, or a high-level individual from the SAF or RSF, will not fundamentally reform the supply chain, or the transnational ecosystem that gold traverses.

Understanding the conflict in Sudan as a product of overlapping and competing ‘outside-in’ and ‘inside-out’ dynamics and networks can improve policy and programming approaches, through mapping the regional conflict ecosystem to better guide interventions. Policymakers seeking to shape sustainable solutions to the war must factor in and navigate both the transnational actors who have a stake in the conflict and their varied interests.

Second, power is diffused across state and society, and this challenges the idea that there is a clear divide between state and non-state actors and institutions. Many elites with authority over the gold supply chain are not state actors, can operate at both state and non-state levels, and do not operate exclusively within the confines of national borders. In many cases, the facilitators of the trade are not the ultimate decision-makers. The breakdown of Sudan’s formal economy and state institutions, along with the fragmentation of territorial control in the country and increasing civilian militarization, indicates that the conflict ecosystem increasingly consists of multiple evolving subnational theatres – with intersecting networks of military, economic and political authority – which have connections across borders. Therefore, there is a need for policymakers to focus not only on those who claim to be state actors, but also on engaging with those at the subnational levels who are performing the conventional role of the state.

Third, the levers of economic power and authority – which contributed to the outbreak of Sudan’s war – are vital for engaging the warring parties and convincing them to engage in a sustainable ceasefire and political process. With contested regime transitions in dominant states including Sudan and Ethiopia, the Horn of Africa region is experiencing the most significant political change since the end of the Cold War. These changes are happening in parallel with wider shifts in the state systems of the Middle East, which are increasing inter-dependencies between Africa and the Middle East, in particular Egypt and the Gulf states.

Economic levers are also crucial for Gulf actors that are seeking to increase their influence, as well as neighbouring states – Chad, Egypt, Eritrea, Ethiopia and South Sudan – which are also seeking to assert their interests. Even a war as destructive as the current one in Sudan, will likely eventually produce a new political settlement. Any lasting settlement that engages with Sudan’s regional conflict ecosystem must consider the economic realities and incentives around Sudan’s conflict gold and other strategic commodities, ensuring that they contribute towards post-war reconstruction and economic resilience, as well as facilitating cross-border and regional interests.

## **Measures to control Sudan’s conflict gold**

Gold is perhaps the most important contemporary vector for economic power and authority in Sudan and its region. It is also a significant contributor to the UAE’s post-carbon economic and security future. The UAE, and specifically Dubai,

is one of the main global hubs for the gold trade, and the economic dependency of Sudanese conflict and civilian actors on gold exports and Emirati financial channels emphasizes the importance of this supply chain in sustaining Sudan's civil war. Additionally, the UAE is also the key actor with agency to influence RSF decision-making and is closely aligned with its economic networks. Egypt is also an important destination for Sudanese gold, with the SAF, which controls the largest gold-producing areas, diverting the commodity through its northern neighbour and smuggling increasing since the war began. Through its economic linkages and substantial political and military backing Egypt has the potential to exercise significant leverage over SAF decision-making.

As such, tougher action is possible by the US, UK and EU and other international partners and institutions, such as the African Union and the UN, which could target the illicit gold trade and establish greater consequences and deterrents for the UAE and other states involved in propagating Sudan's conflict gold.<sup>163</sup> Sanctions provide one option, which are often used as a tool to discourage conflict actors. However, as has been visible in relation to Sudan, without a coordinated political strategy, individual sanctions by themselves will not produce change. The warring parties' economic networks are already the subject of sanctions, with the US, the UK and the EU targeting firms that buy and sell conflict gold from Sudan – including those linked to the SAF and RSF.<sup>164</sup> Targeted sanctions can be effective in disrupting the shifting network of companies and individuals involved in smuggling gold from Sudan, but sanctions and prosecutions are tools of disruption, not of systemic change. They impact individuals and companies for a time, but those affected can adapt, as well as circumvent sanctions because they operate across borders.

Collective sanctioning of high-level individuals, refineries and the companies involved in the smuggling and laundering of conflict gold, including through major hubs such as Dubai, could make a difference, if the necessary political appetite can be mustered. Specifically, the G7 and G20 countries could adopt targeted sanctions like the US Global Magnitsky Sanctions programme – targeting military and government officials, armed group leaders, and other individuals and companies involved in smuggling and laundering Sudanese conflict gold. However, the necessary political will for such action has been undermined by the rapidly shifting global political climate in 2025, resulting in growing divisions between the US and G7 members in Europe and Canada, which holds the presidency of the group in 2025.

The UAE has demonstrated some will to bring its standards into alignment with international best practices. The US, UK and the EU (which already cooperate with the UAE) could intensify dialogue in areas such as international governance and standards setting and encourage the UAE's involvement in frameworks that seek to close the regulatory and enforcement loopholes that allow the trade

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<sup>163</sup> Prendergast, J. and Lake, A. (2024), 'The UAE's Secret War in Sudan: How International Pressure Can Stop the Genocidal Violence', *Foreign Affairs*, 31 July 2024, [https://www.foreignaffairs.com/sudan/uaes-secret-war-sudan?check\\_logged\\_in=1](https://www.foreignaffairs.com/sudan/uaes-secret-war-sudan?check_logged_in=1).

<sup>164</sup> In June 2024, the US Treasury Department blocked seven Emirati-based companies' access to the US financial system on the suspicion that they violated US sanctions on Sudan.

in conflict gold.<sup>165</sup> There is also a need to strengthen policies and enforcement towards midstream and downstream entities in Dubai. High risk or even outright illegal ASGM material could not move the way it does without a system in the gold supply chain to support it. Change would require consolidators, refineries, and the jewellery, banking and technology sectors to willingly and fundamentally change the way they source gold through the supply chain. Ultimately, that would require cooperation with the UAE government and closure of the regulatory and enforcement loopholes that allow for trade in conflict gold, including better oversight for cash and barter transactions for gold, which take place in Dubai's gold souks (marketplaces). Such a process would require all gold refiners in the UAE to undergo an independent third-party audit – in line with OECD and other international frameworks.

Finally, policymakers should be mindful that within Sudan's war economy, the production and trade of gold remains a vital lifeline for millions of Sudanese citizens who have little alternative livelihood opportunities. It also provides the currency required to bring in commodities to the country during a period of prolonged war. ASGM is often seen as an activity to be eradicated through its formalization and mechanization. The priority should be to implement policies that empower communities engaged in ASGM and enhance their resilience. This can be achieved primarily by promoting and subsidizing the adoption of safe extraction techniques that eliminate the severe long-term health risks associated with mercury and cyanide use, as well as mitigating the large-scale environmental damage caused by these substances.

In a post-conflict, reform-oriented Sudan, authorities should adopt the Code of Risk mitigation for Artisanal and small-scale miners engaging in Formal Trade (CRAFT Code) to improve working conditions in the ASGM sector and facilitate partnerships for refining conflict-free gold. Accredited refiners, such as those meeting the standards of the London Bullion Market Association, should establish responsible sourcing partnerships with Sudanese ASGM miners. Additionally, multinational enterprises sourcing gold from Sudan, directly or indirectly, must adhere to the OECD Due Diligence Guidance for Responsible Supply Chains of Minerals from Conflict-Affected and High-Risk Areas to ensure ethical practices.

To further reinforce these reforms, Sudan should work with regional partners towards establishing legal and licit trade channels through neighbouring countries, particularly Egypt and the UAE, to curb smuggling and support the growth of conflict-free gold markets. The UAE government, in particular, must address gaps in its anti-money laundering and counterterrorism financing frameworks, including improving access to beneficial ownership information and addressing

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<sup>165</sup> Some of these frameworks include: the Extractive Industries Transparency Initiative (EITI); the Organisation for Economic Co-operation and Development (OECD), which has due diligence guidelines for responsible mineral supply chains, and provides detailed recommendations to help companies respect human rights and avoid contributing to conflict; the London Bullion Market Association (LBMA), which sets standards for trading in gold and maintains a responsible sourcing programme that provides assurances around the sourcing of gold. Additionally, the Financial Action Task Force (FATF), an intergovernmental body founded by the G7 that combats money laundering, has also pressured Abu Dhabi to address gold and money laundering. The UAE was removed from the FATF grey list, in February 2024, despite evidence of its role in providing illicit arms and interests in Sudan's gold trade. However, this incentive should be used to further encourage the UAE to increase transparency and accountability around the gold sector.

weaknesses in its oversight of foreign crime proceeds. Regulatory loopholes enabling the trade of conflict and high-risk gold, including gold from Sudan, should be closed by implementing internationally recognized best standards and practices.

At the same time, due diligence requirements must be carefully balanced to avoid marginalizing civilians working in the gold sector. Overly restrictive measures could inadvertently drive these communities further into illicit activities, deepening their vulnerabilities. A nuanced approach is essential to achieve both ethical supply chains and sustainable livelihoods for ASGM miners.

## Towards a regional solution

Understanding Sudan's war as part of a complex regional ecosystem, while essential, does not necessarily signpost a simple path to its resolution. And coercive or regulatory approaches, though important, are unlikely to bring peace while the major regional players – notably Egypt, the UAE and Saudi Arabia – remain in competition, both for resources and influence. The war in Sudan is a stark example of how external actors can simultaneously be allies and adversaries, depending on the issue. Broader regional relations, alignments and contestations in the Middle East, such as the UAE's substantial investments in the Egyptian economy, or its growing regional contestation with Saudi Arabia, are critical when seeking to understand regional countries' interests and how they impact on Sudan's war. Despite being allies, Egypt and the UAE have broadly supported opposing sides in Sudan, and also diverge on other regional issues, notably Ethiopia and its interest in securing 'access to the Red Sea' via a naval port on the Somaliland coast.<sup>166</sup> As such, Egypt has sought to balance its dependence on the UAE by seeking greater partnership and investment from Saudi Arabia.<sup>167</sup> Such regional complexities pose a challenge to US, UK or EU policies and complicate efforts to respond to the conflict in Sudan.

The involvement of Egypt, the UAE and Saudi Arabia in mediation efforts remains crucial to reaching a sustainable ceasefire and ensuring a viable political process. But this will require an accommodation to be found that allows each country to compromise on some of their existing interests. Convincing the UAE that its strategic, economic and reputational interests are better served through the pursuit of peace will be key to sustainable change in the regional conflict ecosystem. Furthermore, it is crucial to persuade Egypt that long-term influence in Sudan will best be secured by encouraging an even-handed political settlement rather than seeking to return General Burhan and an Islamist-influenced SAF to power.

As allies, Egypt and the UAE should be encouraged to find common ground over their divergent regional policies, particularly as they relate to Sudan. Ultimately, the warring parties' political, military and economic reliance on Egypt and the

<sup>166</sup> The UAE's Dubai Ports World co-owns and runs Berbera port in Somaliland and the UAE is also a substantial investor in Ethiopia, the federal government of which is seeking to establish a naval base in Somaliland as well as to diversify its economic maritime port access beyond a reliance on Djibouti.

<sup>167</sup> Egypt Today (2024), 'Egypt, Saudi Arabia sign accords to encourage mutual investment, form supreme coordination council', 16 October 2024, <https://www.egypttoday.com/Article/1/135398/Egypt-Saudi-Arabia-sign-accords-to-encourage-mutual-investment-form>.

UAE puts these external actors in a unique position to persuade the SAF and the RSF to agree a sustainable ceasefire. For example, Egypt is well placed to soften the existing enmity between the SAF and the UAE.

An effective coalition of actors, including the UK, US, Norway, EU and other like-minded partners, such as Canada, is required to engage in a robust process with regional partners – including Egypt, the UAE and Saudi Arabia – on practical steps towards compromise and the reduction of hostilities required to reach a ceasefire.

A high-level UK conference on Sudan, planned for 15 April 2025 (marking the two-year anniversary of the war), could provide an opportune moment to take this forward. However, establishing an international coalition on Sudan has not been straightforward to date. It may realistically have to be done without much support from the US, given the Trump administration's increasing focus on its own sphere of influence, and a weakening of traditional alliances in the West. The US position on Sudan under Trump remains unclear, but it is unlikely to be elevated in priority, or receive sustained high-level attention. Thus, a new coalition, or 'minilateral' agreement, could present an opportunity for other countries to lead, and ensure that any transactional agreements also guarantee the advancement of civilian-centred outcomes.

However, the US's Sudan policy is likely to be influenced by interests and calculations around wider geopolitics in the Middle East. The Abraham Accords are a notable factor – both the UAE and Sudan are signatories – and the US would like Saudi Arabia to have a similar agreement. This is connected to a resolution of the Gaza conflict and future reconstruction, which the Gulf states and Egypt have an important stake in. Saudi Arabia, already the host of the unsuccessful Jeddah mediation platform, has grown in diplomatic stature given its hosting of the US's mediation of the Russia–Ukraine conflict in 2025. These factors again reinforce the likely prominence of a regional vision for resolving Sudan's conflict – which will likely include a stronger role for military actors in shaping Sudan's future transition.

These regional interests cannot be wished away – Sudan's neighbours and wider region will remain part of its future, and gold will continue to be a valuable and sought after commodity. But these regional dynamics and contestations can be brought into alignment with a common vision that articulates and underlines the shared benefits that all – especially Sudan's long-suffering civilians – would gain from sustainable peace in Sudan. It is increasingly clear that the long-term strategic interests of Egypt, the UAE and Saudi Arabia in Sudan and the broader Horn of Africa and Red Sea regions will not benefit from Sudan's fragmentation. The most critical task for international diplomacy is to ensure that this long-term vision is not obscured by a short-term scramble for profit or profile.

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Cover image: Men sit in front of a gold-trading business in Atbara, Sudan, October 2021. Cross-border trading networks have expanded rapidly in recent years as gold prices have increased.

Photo credit: Copyright © Simon Marks/Bloomberg/Getty

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