

Ministry Of Trade
Sudan Trade Point

TRADE PROFILE FOR
SUDAN (2010)

Report No: (28)



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Contents

List of Tables	iii
1.0 Introduction	1
2.0 Sudan's Trade Balance	2
3.0 Product Performance	6
3.1 Product Performance in Non-COMESA Markets	6
3.2 Product Performance in COMESA Markets	7
3.3 Sudan's Major Importers	8
3.4 Market Shares in the COMESA Region	11
4.0 Product Dynamism	13
4.1 Dynamic Sectors	13
4.2 Dynamic Products	14
5.0 Conclusion	16

List of Tables

Table 1: Sudan's Top Exported products and their Markets in 2010	3
Table 2: Products that Gained Market Share in Non-COMESA Markets	6
Table 3: Products that Gained Market Share in the COMESA Markets.....	7
Table 4: Importers and their Shares in Sudan's Exports.....	8
Table 5: COMESA Importers and their Shares in Sudan's Exports.....	11
Table 6: Sectors Performance in World Exports	13
Table 7: Dynamic Products on the World Market	14

List of Graphs

Graph 1: Growth of National Supply and International Demand for export products of Sudan..... 15

Acronyms

CIDA	Canadian International Development Agency
COMESA	Common Market for Eastern and Southern Africa
HS	Harmonized System
ITC	International Trade Centre
PACT	Programme for Building African Capacity for Trade
UK	United Kingdom
USA	United States of America

Executive Summary

This analysis focuses on trade performance for Sudan's export products using 2010 trade statistics available in International Trade Centre's (ITC) Trade Map. The report is a product of a training workshop on Market Analysis and Research, which was offered in 2011 by the ITC in collaboration with the Common Market for Eastern and Southern Africa (COMESA), under the Programme for Building African Capacity for Trade (PACTII), funded by the Canadian International Development Agency (CIDA).

Sudan's exports depend on petroleum products. The analysis has established that Sudan's main export product is Petroleum oils and the dependence on this product has declined over the past five years. Other important export products for Sudan are Sheep, live (HS 010410), Sesamum seeds (HS 120740), Gold (HS 710812), Gum Arabic (HS 130120), Cotton (HS 520100), Chromium ores (HS 261000) and Plants & parts of plants (HS 121190). Just Light petroleum have gained market share in the COMESA market, and petroleum, sheep live, Gum Arabic, cotton and Chromium have gained market share in non-COMESA markets during the past five years. Sudan's export transformed in 2006 of Petroleum oils, not crude product to Crude petroleum oils product in 2010.

Non-COMESA countries have the highest share in Sudan's exports. However, over the last five years, Sudan's dependence on non-COMESA markets has reduced from 98.4% of Sudan's exports in 2006 to 98.2% in 2010.

Over the same period COMESA countries as markets for Sudan's exports has increased slightly from 1.6% of Sudan's exports in 2006 to 1.8% in 2010.

The analysis has further identified Petroleum oils, sheep live, light petroleum, Gum arabic, Petroleum coke, and Chromium among the most dynamic export products from Sudan, in the sense that Sudan's exports of these products have gained market share and also their international demand is outperforming average growth in world trade.

Based on analysis of trade data there would appear to be opportunities for Sudan to further expand exports of Petroleum oils, sheep live, light petroleum, Gum arabic, Petroleum coke, and Chromium, particularly to some COMESA markets which may be easier to trade with because of geographical proximity and the existence of market access preferences under the COMESA trade agreement.

1.0 Introduction

This report presents trade performance analysis done for Sudan using 2010 trade statistics available in International Trade Centre's (ITC) Trade map. The report is a product of a training workshop on Market Analysis and Research, which was offered in 2011 by the ITC in collaboration with the Common Market for Eastern and Southern Africa (COMESA), under the Programme for Building African Capacity for Trade (PACTII), funded by the Canadian International Development Agency (CIDA).

Sudan is one of the members of COMESA. It shares boundaries with Egypt in the north, Libya in the north-west, Eritrea in the east and Ethiopia in south-east. The separation of Sudan was the reason for the exclusion of some COMESA's countries from shares boundaries such as Kenya, Congo and Uganda. Sudan's economy is primarily based on agriculture, which accounts for 31.3% of the gross domestic product. Sudan has a population of 33.4 million after separation.

The analysis focuses on Sudan's top export products and key markets for each product, both within and outside the COMESA region. The review is for both agricultural and non-agricultural products. The analysis further looks at the prospects for market diversification for products exported by Sudan and also performance of Sudan's export products.

This report has seven sections. The first section is a brief introduction. The second section presents Sudan's 2010 trade balance, Sudan's top export products and their markets. The third section goes into more detail analyzing performance of Sudan's export products in the COMESA and non-COMESA markets. The fourth section looks at the concentration of Sudan's exports by product and by market over the last five years. The analysis covers both all the main markets and the markets in the COMESA region. The fifth section examines dynamism in Sudan's export sectors and products. Section six concludes the analysis with some recommendations.

2.0 Sudan's Trade Balance

In 2010, Sudan's total exports were valued at USD 9.3 billion whilst the value of total imports was USD 7.2 billion resulting in a positive trade balance of USD 2.1 billion. Sudan largely exports petroleum and petroleum products. Also Sudan's exports depend on agriculture sector like Sheep, live, Sesamum seeds, Gum Arabic, cotton, Plants & parts of plants. The main non-agricultural commodities, which the country also exports, are gold and Chromium. These products are exported to countries both within and outside the COMESA region.

The following table summarizes Sudan's top ten export products (accounting for about 98% of total exports in value terms), their key markets in the COMESA and Non-COMESA regions. It also shows product concentration in these markets and whether Sudan is gaining or losing shares in these markets.

Table 1: Sudan's Top Exported products and their Markets in 2010

HS Code	Product Name	Total Exported Value (USD '000)	Product's Share in Sudan's Exports in 2010	Cumulative share in total exports In 2010	Cumulative share in total exports In 2006	Top 3 markets within COMESA	Top 3 COMESA Partners: Export value & share in Sudan's exports (USD '000)	Annual Growth of exports to COMESA Market 2006-10	Did Sudan Exports to partner grow faster than COMESA Partner's imports from World (Yes/No)	Top 3 Non-COMESA Markets	Top 3 non-COMESA Partners: Export value & share in Sudan's exports (USD '000)	Annual Growth of Sudan's exports to top 3 non-COMESA Markets 2006-10	Did Sudan Exports to partner grow faster than non-COMESA Partner's imports from World (Yes/No)
Total	All products	9,337,588											
'270900	Petroleum oils and oils obtained from bituminous minerals, crude	8,445,138	90.4%	90.4%	0%	No Partners	0	0	-	China	6,556,199 (77.6 %)	30 %	Yes (30% > 17%)
										Japan	1,211,298 (14.3 %)	-24 %	No (-24% < -1%)
										India	462,310 (5.5%)	56%	Yes (56%>9%)
'010410	Sheep, live	177,365	1.9%	92.3%	1.9%	No Partners	0	0	-	Saudi Arabia	174,586 (98.4%)	18 %	Yes (18%>-4 %)
										Jordan	2,779 (1.6%)	No data	?
'120740	Sesamum seeds, whether or not broken	177,365	1.9%	94.2%	4.5%	Egypt	18,801 (11.2%)	No data	?	China	62,161 (37.2%)	10%	No (10 %< 29%)
										Lebanon	25,354 (15.2%)	16%	No (16 %< 21%)
										Saudi Arabia	18,783 (11.2%)	3%	No (3 %< 12%)
'271019	Light petroleum distillates nes	88,312	0.9%	95.1%	4.5%	Ethiopia	87,429 (99%)	20%	Yes (20%>14%)	China	733 (0.8 %)	226 %	Yes (226%>6%)
						Uganda	148 (0.2%)	69%	Yes (69%>13%)	Indonesia	2 (0%)	No data	?
'710812	Gold in unwrought	83,568	0.9%	96.0%	5.9%	No Partner	0	0	-	Canada	80,195	5 %	No (5 %< 32%)

	forms non-monetary										(96%)		
							0	0	-	Saudi Arabia	3,373 (4%)	-22%	No (-22 % < 18%)
'130120	Gum Arabic	78,313	0.8%	96.9%	6.8%	Egypt	22 (0.0%)	No data	?	France	37,296 (47.6%)	23%	Yes (23% > 4%)
										USA	8,716 (11.1%)	9%	Yes (9% > -5%)
						Uganda	4 (0.0%)	No data	?	UK	6,833 (8.7%)	12	Yes (12% > 3%)
'520100	Cotton, not carded or combed	43,215	0.5%	97.3%	8.1%	Egypt	16,862 (39%)	No data	?	China	9,124 (21.1%)	4	Yes (4% > -2%)
						-	-	-	-	Pakistan	8,133 (18.8%)	-23	No (-23 % < 7%)
						-	-	-	-	India	3,955 (9.2%)	-27	No (-27 % < -12%)
'271311	Petroleum coke, not calcined	21,897	0.2%	97.6%	8.1%	Ethiopia	11,042 (50.4%)	No data	?	China	10,569 (48.3%)	No data	?
						-	-	-	-	India	204 (0.9%)	-46%	No (-46 % < 5%)
						-	-	-	-	Serbia	82 (0.4%)	-42%	No (-42 % < 9%)
'261000	Chromium ores and concentrates	19,601	0.2%	97.8%	8.2%	-	-	-	-	China	19,394 (98.9%)	28%	Yes (28% > 24%)
						-	-	-	-	Belgium	206 (1.1%)	No data	?
						-	-	-	-	Turkey	1 (0.0%)	No data	?
'121190	Plants & pts of plants (incl sed & fruit) used in pharm, perf, insect etc nes	17,817	0.2%	98.0%	8.2%	Egypt	18 (0.1%)	No data	?	Mexico	14,636 (82.1 %)	-3 %	No (-3% < 10%)
						-	-	-	-	Japan	959 (5.4%)	10%	No (10% < 13%)
						-	-	-	-	Finland	694 (3.9 %)	0%	No (0 % < 10%)

Source: ITC Trade Map

The table above shows that Petroleum and petroleum products accounted for over 90% of Sudan's total exports in 2010. However there was some increase in dependence on this product group since 2006 especially Crude petroleum oils. Overall, Sudan's product concentration increased tremendously between 2006 and 2010 with the top 10 products accounting for 8.2% of exports in 2006 compared with 98% in 2010.

Sudan has markets within the COMESA region as well as in non-COMESA countries. In the COMESA region, Sudan's main export markets are Egypt, Ethiopia and Uganda; whilst in other regions, the country has major markets are China, Japan, India, Saudi Arabia, Indonesia, Canada, France, Jordan, Lebanon and United Kingdom.

3.0 Product Performance

The analysis in this section looks at the performance of Sudan's products in the Non-COMESA and COMESA markets.

3.1 Product Performance in Non-COMESA Markets

There were variations in the performance of Sudan's export products on non-COMESA markets. Some products gained market share, whilst others lost. The table that follows shows products that gained market share in the respective Non-COMESA markets.

Table 2: Products that Gained Market Share in Non-COMESA Markets

Product Code	Product Name	Non-COMESA Market	Annual Growth of Sudan's Exports to the Partner Market between 2006 – 2010 (%)	Annual Growth of the Partner's Imports from the World between 2006 – 2010 (%)
270900	Petroleum oils and oils obtained from bituminous minerals, crude	China	30	17
		India	56	9
010410	Sheep, live	Saudi Arabia	18	-4
271019	Light petroleum distillates nes	China	226	6%
130120	Gum Arabic	France	23	4
		USA	9	-5
		UK	12	3
520100	Cotton, not carded or combed	China	4	-2
261000	Chromium ores and concentrates	China	28	24

Source: ITC Trade Map

The table above shows that Sudan's Petroleum oils crude products have gained market share in China and India markets. Sudan's Sheep, live has increased market share in Saudi Arabia; Light petroleum distillates nes in China, Gum Arabic in France, USA and UK; Cotton, not carded in China; and Chromium ores has also gained market share in China.

3.2 Product Performance in COMESA Markets

Similar to non-COMESA markets, there were some products which gained market share in COMESA markets. The following table summarizes the products, which gained market share in the COMESA countries.

Table 3: Products that Gained Market Share in the COMESA Markets

Product Code	Product Name	COMESA Market	Annual Growth of Malawi's Exports to the Partner Market between 2006 – 2010 (%)	Annual Growth of the Partner's Imports from the World between 2006 – 2010 (%)
271019	Light petroleum distillates nes	Ethiopia	20	14
		Uganda	69	13

Source: ITC Trade Map

Trade between Sudan and the COMESA is weakened compared with the trade between Sudan and Non-COMESA Markets

The major product that gained market share in the COMESA markets in 2010 is Light petroleum. Light petroleum gained market share in Ethiopia and Uganda.

Due to the unavailability of growth indicators (both in terms of export growth and market growth) for several of products exported to COMESA markets, it is difficult to determine in the case of several products, whether or not Sudan gained market share over the last 5 years. However looking at time series export data over the last decade one can see that Sudan opened up several new markets in the COMESA region for a number of products. Also noteworthy however is the high degree of variability in export values from one year to the next for certain markets and in some cases a total collapse in exports. These cases are summarized briefly below:

- Sudan's exports of partly or wholly stemmed and stripped Sesamum seeds (HS120740) to Egypt grew from zero in 2007 to \$19 million respectively in 2010.

- Between 2006 and 2010 Sudan started exporting Light petroleum (HS271019) to Ethiopia and Uganda. In particular, exports to Ethiopia have performed well growing from zero in 2006 to \$87 million in 2010.
- Between 2006 and 2010 exports of Gum Arabic (HS 130120) to COMESA markets decrease from \$557 million to \$78 million.
- For Cotton (HS 520100) Sudan's exports to Egypt decrease from \$32 million in 2005 to \$17 million in 2010.
- Between 2006 and 2010 Sudan started exporting petroleum coke (HS271311) to Ethiopia from zero in 2006 to \$11 million in 2010.

3.3 Sudan's Major Importers

The following table depicts top markets for Sudan in 2010. It also shows shares that the markets had in Sudan's exports in 2006 and 2010.

Table 4: Importers and their Shares in Sudan's Exports

Importers	Exported value in 2006 (USD 000)	Share in Sudan's exports in 2006	Cumulative Share in Sudan's export 2006	Exported value in 2010 (USD 000)	Share in Sudan's exports in 2010	Cumulative Share in Sudan's exports (2010)
Total	666217			9337588		
China	4324284	78.9	78.9	6671907	71.5	71.5
Japan	299032	5.5	84.4	1219688	13.1	84.6
India	22197	0.4	84.8	496502	5.3	89.9
Saudi Arabia	154669	2.8	87.6	209861	2.2	92.1
Ethiopia	124	0.0	87.6	109302	1.2	93.3
Indonesia	5087	0.1	87.7	103657	1.1	94.4
Canada	66845	1.2	88.9	80620	0.9	95.3
Malaysia	13	0.0	88.9	50597	0.5	95.8
Egypt	68635	1.3	90.2	41465	0.4	96.2
Thailand	2180	0.0	90.2	39636	0.4	96.6

France	15213	0.3	90.5	39111	0.4	97
Chinese Taipei	1051	0.0	90.5	33307	0.4	97.4
Jordan	3915	0.1	90.6	30835	0.3	97.7
Lebanon	13549	0.2	90.8	25595	0.3	98
Germany	21319	0.4	91.2	22407	0.2	98.2
Netherlands	7305	0.1	91.3	18672	0.2	98.4
Republic of Korea	6477	0.1	91.4	17361	0.2	98.6
United Kingdom	50764	0.9	92.3	17045	0.2	98.8
Mexico	5906	0.1	92.4	15045	0.2	99
Pakistan	6239	0.1	92.5	11939	0.1	99.1

Source: ITC Trade Map

Over the last five years, Sudan's has become more dependent on its top ten export destination markets, with the top ten accounting for 99.1% in 2010 compared with 92.5% in 2006. Most strikingly an almost entirely new and very important market opened up for Sudan over the last 5 years, namely Japan (concentrated mainly on petroleum).

The next most dramatic market growth has come from India with Sudan's exports (concentrated mainly on petroleum) growing by a multiple of 22 from \$22 million in 2006 to over \$496.5 million in 2010 and rising from the 8rd to the 3th most important market for Sudan in only 5 years. By contrast Egypt has declined from absorbing 1.3% of Sudan's exports and being the top market in 2006 to being the 5th to 9th in 2010 and absorbing only 0.4% of exports (mostly due to a collapse in sesamum and cotton exports to this market).

Other markets that have shown significant dynamism for Sudan over the last five years include:

- Sudan's export to Ethiopia (mostly light petroleum) growing by a multiple from \$0.1 million in 2006 to over \$109 million in 2010 and rising from 52th to 5th place due to a 881 fold increase in exports.
- Indonesia rising from 24th to 6th place due to a 20 fold increase in exports (mostly petroleum).
- Malaysia rising from 59th to 8th place, due to 3892 fold increase in exports (mostly petroleum)
- Thailand rising from 31th to 10th place, with an almost 18 fold increase in exports (concentrated mainly on petroleum).

- Chinese Taipei rising from 42th to 12th place, due to a 32 fold growth in exports (mostly petroleum).
- Jordan rising from 27th to 13th place, due to a 8 fold growth in exports (sheep, sesamum)
- Uk falling from 7th to 18th place (due to a collapse in Cargo containers designed exports which was partly offset by an important increase in Raw cane sugar exports)

In terms of COMESA markets overall, one was among Sudan's top 10 markets in 2006 (Egypt,) and only two were among the top ten in 2010, (Ethiopia and Egypt) and Ethiopia had moved up the from 52th to 5rd place and Egypt moved down from 5th to 9th place respectively.. Overall, we can see that while Sudan has become marginally more concentrated in terms of products for exports, it has made progress towards market diversification in the last five years, with an important new orientation to dynamic emerging markets.

3.4 Market Shares in the COMESA Region

The analysis goes further to look at whether or not COMESA has increased in importance for Sudan as an export region. The following table provides a summary of indicators for Sudan's market share in the COMESA region.

Table 5: COMESA Importers and their Shares in Sudan's Exports

Importers	Exported value in 2006 (USD '000)	Share in Sudan's exports in 2006 (%)	Cumulative Share in Sudan's exports in 2006 (%)	Exported Value In 2010 (USD '000)	Trade balance 2010 (USD thousand)	Share in Sudan's exports in 2010 (%)	Cumulative share in Sudan's exports 2010 (%)	Exported growth in value between 2006-2010 (% p.a.)	Total import growth in value of partner countries between 2006-2010 (% p.a.)	Increase (decrease) in Sudan's share in the COMESA market (percentage points)
Total	5,478,706			9,337,588	2,165,180			8	3	5
(COMESA)	87,981	1.6		167,439	-1,000,442	1.8				
Ethiopia	124	0.0	0.0	109,302	-42,011	1.2	1.2	19	14	5
Egypt	68,635	1.3	1.3	41,465	-517,782	0.4	1.6			0
Zimbabwe	0	0.0	1.3	9,160	2	0.1	1.7	572	29	543
Uganda	43	0.0	1.3	3,828	-204,739	0.0	1.8	136	15	121
Kenya	1,214	0.0	1.3	2,114	-235,374	0.0	1.8	11	12	-1
Rwanda	0	0.0	1.3	893	-611	0.0	1.8		27	-27
Burundi	0	0.0	1.3	383	383	0.0	1.8	48	0	48
Malawi	0	0.0	1.3	152	151	0.0	1.8	172	17	155
Madagascar	12	0.0	1.3	142	80	0.0	1.8	2	10	-8
Mauritius	0	0.0	1.3	0	-14	0.0	1.8		3	-3
Zambia	0	0.0	1.3	0	-527	0.0	1.8		11	-11
Libyan Arab Jamahiriya	3,598	0.1	1.3	0	0	0.0	1.8			0
Eritrea	14,355	0.3	1.6	0	0	0.0	1.8			0

Source: ITC Trade Map

In 2006, COMESA markets in aggregate accounted for 1.6% of Sudan's exports. Five years later, COMESA markets account for 1.8% of Sudan's exports. Thus COMESA has increased in importance for Sudan as an export region.

Specific COMESA markets where Sudan has gained market share include Ethiopia, Zimbabwe, Uganda, Burundi and Malawi. The country has lost market share in the rest of the COMESA markets.

In general, the COMESA region is increasingly importing from Sudan, whilst the shares in Sudan's exports are declining for most countries like the China, Canada, Germany, and the United Kingdom. There are however some important developed market exceptions like Japan (market for petroleum) and France (market for Gum Arabic).

Product Dynamism

The analysis in this section examines dynamism of products. The focus is on products where world demand has outperformed average growth in world trade and also for which Sudan is increasing its world market share.

3.5 Dynamic Sectors

The analysis on dynamism starts by looking at the sectors (HS -4 Digit products). The following table shows sectors whose growth in value during the last five years has outperformed the world trade.

Table 6: Sectors Performance in World Exports

Code	Product label	Trade Indicators		
		Sudan's Exported value 2010 (USD thousand)	Annual growth in value of Sudan's exports between 2006-2010 (% p.a.)	Annual growth of world imports between 2006-2010 (% p.a.)
TOTAL	All products	9337588	8	3
'2709	Crude petroleum oils	8445138	9	4
'0104	Live sheep and goats	183796	19	2
'1301	Lac; natural gums, resins, gum-resins & balsams	81616	7	1
'2713	Petroleum coke, petroleum bitumen & other residues of petroleum oils	21921	19	11
'2610	Chromium ores and concentrates	19601	28	19

Source: ITC Trade Map

Crude petroleum, live sheep and goats, natural gums, Petroleum coke and Chromium sectors outperformed average growth in world trade (3%) in the period between 2006 and 2010, thus they were dynamic products compared to world trade in all products. During the same period, Sudan has also been gaining market share in these sectors as Sudan's export growth for these products exceeded growth in world imports for these products.

3.6 Dynamic Products

This assessment further focuses on products at the HS six digit level that are exported by Sudan, which are also more dynamic than world trade and for which Sudan is also gaining share in the world market. The table below provides a summary of these products.

Table 7: Dynamic Products on the World Market

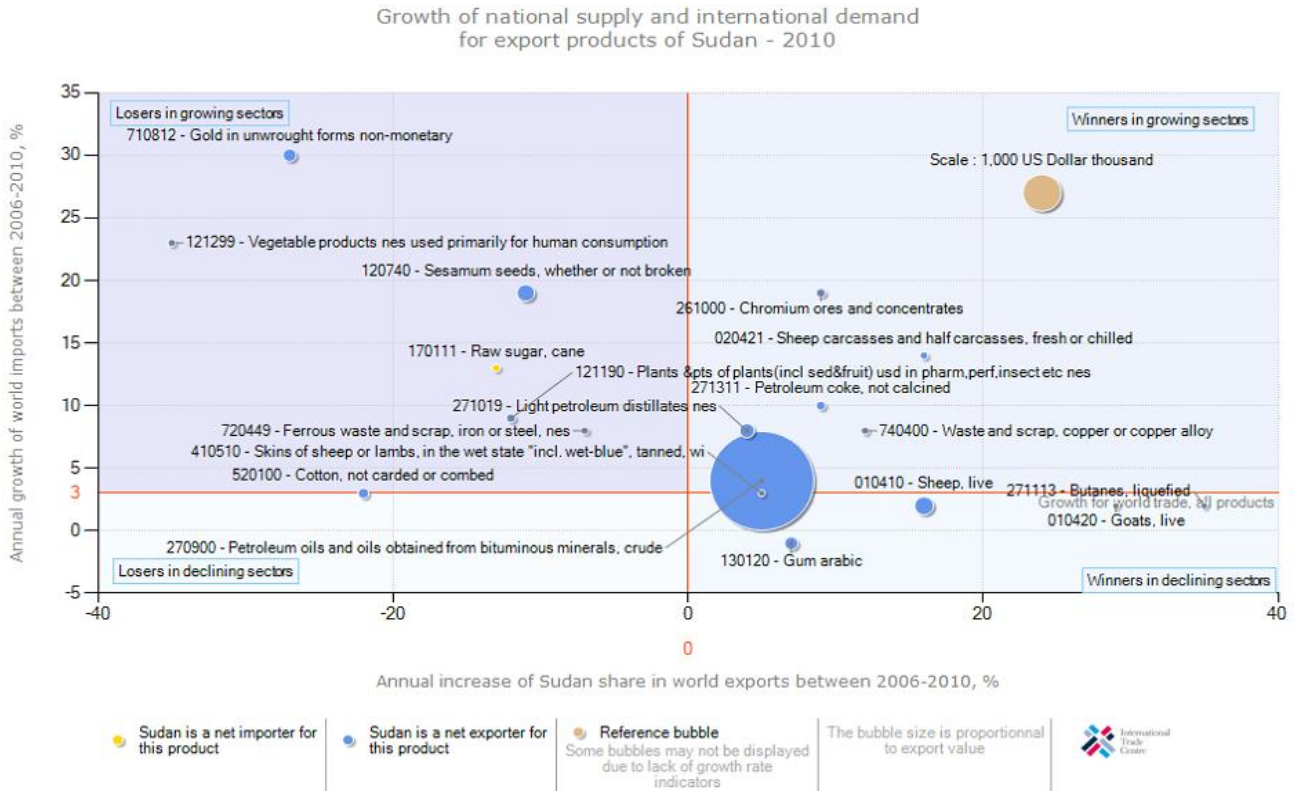
Code	Product label	Trade Indicators		
		Sudan's exported value 2010 (USD thousand)	Annual growth in value of Sudan's exports between 2006-2010 (% p.a.)	Annual growth of world imports between 2006-2010 (% p.a.)
TOTAL	All products	9337588	8	3
'270900	Petroleum oils and oils obtained from bituminous minerals, crude	8445138	9	4
'010410	Sheep, live	177365	18	2
'271019	Light petroleum distillates nes	88312	12	8
'130120	Gum arabic	78313	6	-1
'271311	Petroleum coke, not calcined	21897	19	10
'261000	Chromium ores and concentrates	19601	28	19
'740400	Waste and scrap, copper or copper alloy	15958	20	8
'020421	Sheep carcasses and half carcasses, fresh or chilled	15754	30	14
'410510	Skins of sheep or lambs, in the wet state "incl. wet-blue", tanned, wi	6915	8	3
'271113	Butanes, liquefied	6556	37	2

Source: ITC Trade Map

Table 7 shows that the world demand for all products has grown by an average of 3% per year between 2006 and 2010. During this period, some of Sudan's export products have performed very well by surpassing the world import growth for these products and thus gaining market share. These products

include Petroleum, Sheep, live, Gum arabic, Chromium, copper, Sheep fresh or chilled, Skins of sheep and Butanes liquefied. In addition there are a number of manufactured products which have grown at or just above the world average for world trade but for which Sudan's exports have also grown very rapidly, particularly to COMESA markets (see graph 1 below).

Graph 1: Growth of National Supply and International Demand for export products of Sudan



4.0 Conclusion

The analysis has established that Sudan's main export product is petroleum & petroleum products and the dependence on this product has declined over the past five years. Other important export products for Sudan are sheep live, Sesamum seeds, gold, Gum Arabic, cotton, Chromium and Plants.

The products Petroleum oils crude, Sheep live, light petroleum, Gum Arabic, Cotton and Chromium ores have gained market share in non-COMESA markets during the past five years and the major product that gained market share in the COMESA markets is Light petroleum.

However, Sudan's export products are gaining market shares in the Non-COMESA markets faster than in the COMESA markets. Which is the only non-agricultural commodity among Sudan's top ten export products and which has become Sudan's most important export product after petroleum in terms of export revenue.

The analysis has also found that COMESA's share in Sudan's exports has increased from 1.6% to 1.8% over the past five years.. Thus Sudan is increasingly trading within its own region. Another important trend in terms of the evolution of markets is the rapid growth in Sudan's exports to emerging markets like Indonesia, Malaysia and Thailand. Dependence on traditional markets like China, Canada and The UK has declined but a few developed markets like Japan and France are increasingly important (important for exports of petroleum and gum arabic)

The analysis has further shown that petroleum, sheep live, Gum Arabic, Cotton and Chromium are among the most dynamic export products from Sudan. Sudan is gaining market share for these products and in addition growth in world demand for these products is outperforming the growth in world trade for overall.

This analysis shows that Sudan exports quite a number of "dynamic products", i.e. products for which global demand is growing faster than growth in world trade for all products. The analysis also shows that Sudan is reorienting its exports towards dynamic markets such as India, Saudi Arabia, Ethiopia, Indonesia, Malaysia, Egypt, Thailand, France and Jordan. Some dramatic shifts have also taken place in the profile of Sudan's exports over the last 5 years with the commencement of petroleum exports to China and the shift away from dependence on a few traditional markets including Canada, Germany, and the United Kingdom. to a more even spread across traditional and emerging markets in 2010. Sudan also appears to be taking advantage of the increased demand for its export products from some COMESA countries, which may be easier to trade with because of geographical proximity and because of the existing preferential trade regime.