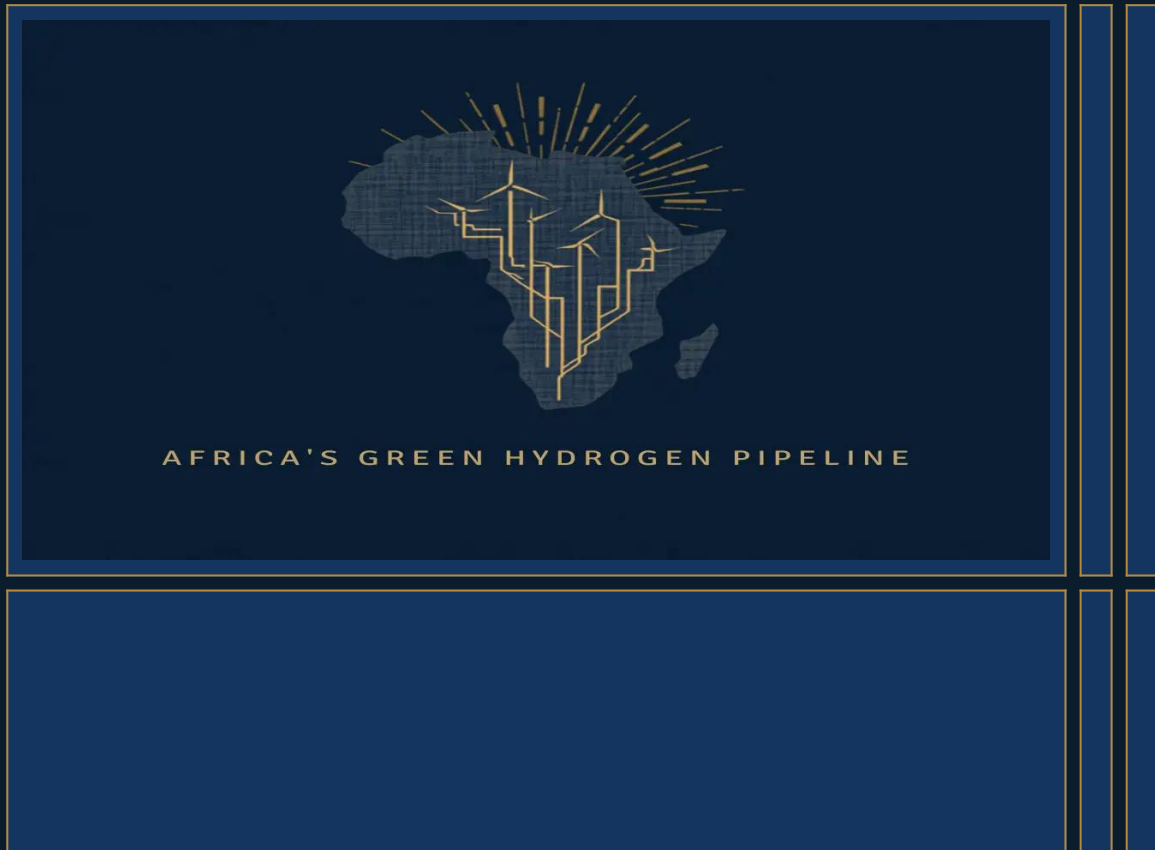




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Africa's Green Hydrogen Pipeline: One Investment Decision Out of 31 Projects. Sudan Says Water and Food Come First.

Research Team

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Only one of 31 announced African green-hydrogen projects has reached a final investment decision. At a Cairo panel this week, a Sudanese water-ministry official said the continent should secure its own energy, water, and food needs before exporting hydrogen.

SITUATION REPORT | 3Bi Research Team | 14 August 2026

Headline Fact

Of the 17 gigawatts of electrolyser capacity Africa has announced across 31 low-emissions hydrogen projects targeting 2030, only one has reached a final investment decision (FID) — a 2% conversion rate from announcement to bankable project, according to the IEA's *Global Hydrogen Review 2026*, cited in Energy Transition Africa's analysis (27 July 2026). At a Cairo industry panel this week, a Sudanese Ministry of Irrigation and Water Resources sustainability expert argued the continent should secure its own energy, water, and food needs before expanding hydrogen exports at all (attaqa.net, 13 August 2026).

Timeline

- **End of 2025** — The African Development Bank's Sustainable Energy Fund for Africa (SEFA) approves and capitalizes its Green Hydrogen Programme with German government funding. (afdb.org, 8 April 2026)
- **June 2025** — Mauritania's Project AMAN, a \$40 billion, 30-gigawatt green ammonia initiative led by CWP Global, is suspended after the developer says no buyer will pay a price "that works for producers." Land-concession agreements covering 20 of the project's 23 million tonnes of announced ammonia capacity are put on hold. (Energy Transition Africa, 27 July 2026)
- **8 April 2026** — AfDB/SEFA announces its Green Hydrogen Programme call for proposals, opening 10 April, offering up to \$20 million in pre-investment financing — feasibility studies, engineering design, transaction advisory — to three to five top-ranked projects. (afdb.org, 8 April 2026)
- **11 May 2026** — The SEFA call for proposals closes. No public list of selected projects has been found as of this report.
- **May 2026** — Denmark's Topsoe is selected as electrolyser supplier for South Africa's Coega Green Ammonia Project, the pipeline's most advanced initiative, in a deal worth roughly \$1 billion. (Energy Transition Africa, 27 July 2026)
- **27 July 2026** — Energy Transition Africa publishes its analysis of the IEA's *Global Hydrogen Review 2026*, establishing the 2%-FID figure and the underlying cost-of-capital data.
- **11–12 August 2026** — Solar & Storage Live Egypt ("The Solar Show MENA") convenes in Cairo. A



panel titled "Solar Energy and Beyond: Green Hydrogen as a Gateway to Africa's Energy Future" brings together Egyptian, UN, and Sudanese officials to debate the continent's hydrogen strategy.

- **13 August 2026** — attaq.net publishes its report on the panel, including on-record remarks from Moheib Abkar Geddo, a sustainability expert at Sudan's Ministry of Irrigation and Water Resources.

What We Know

Financing, not sunlight, is the binding constraint. Financing costs account for 30–40% of total hydrogen production cost in most African markets; weighted average cost of capital runs roughly 6.6–8.3% in Namibia, Morocco, and South Africa and climbs to about 16% in Tunisia and Ghana, against 2.3% in Germany and 3.6% in China. Each additional percentage point of cost of capital adds an estimated \$0.20 per kilogram to the levelised cost of hydrogen. (Energy Transition Africa, 27 July 2026, citing the IEA)

Only two of Africa's 54 countries — Botswana and Mauritius — hold investment-grade sovereign credit ratings from all major agencies, which limits how cheaply even a technically sound project can borrow. (same source)

The Cairo panel split on how to respond. Ambassador Islam Ashour, Egypt's Permanent Observer to the UN, warned Africa risks repeating a familiar pattern — owning the sun and wind but not the value chain — and called for a continent-wide policy and certification framework. Dr. Marwa Haidar of Egypt's state gas company EGAS pointed to currency instability and financing costs as the core barrier and called for blended public-private finance. Engineer Osama Fawzy Guirguis, CEO of the Hydrogen Intelligence platform, argued giant projects aren't the right model for the continent and pushed instead for smaller, locally financed projects carrying less capital risk. (attaqa.net, 13 August 2026)

More than 80% of Africa's announced low-emissions ammonia capacity currently targets export to Europe and Asia, even though the continent uses fertiliser at one-sixth the global average and ran a \$22 billion food-trade deficit in 2024. (Energy Transition Africa, 27 July 2026)

Sudan's Ministry of Irrigation and Water Resources representative, Moheib Abkar Geddo, told the Cairo panel that Africa's hydrogen sector has moved from "the strategy-announcement stage to the implementation stage," but warned against full dependence on imported technology and argued the goal should not be exporting clean energy but building local industries — green ammonia, nitrogen fertiliser, low-carbon steel — while first securing domestic energy, water, and food needs. (attaqa.net, 13 August 2026)



What We Don't Know

Which projects, if any, SEFA's Green Hydrogen Programme selected from its call for proposals: no result has been published as of this report, three months after the 11 May deadline.

Whether Sudan has a specific green hydrogen project of its own in development. Geddo's remarks addressed continental strategy; they were not reported as describing a named Sudanese pilot, and this report does not claim one exists — only that a Sudanese ministry official is shaping the continental policy conversation.

What cost or timeline Guirguis's proposed small/medium-scale model would achieve in practice: the panel report did not quantify it.

Do-No-Harm Note

All five individuals named in this report spoke on the record, in their professional capacities, at a public industry conference covered by a named outlet. None is a vulnerable individual, and no security, displacement, or conflict-sensitive material is involved. We specifically checked whether naming Geddo and her ministry title could carry any risk given Sudan's conflict context, and found none: her remarks concerned continental hydrogen policy, not any operational or security-sensitive Sudanese matter.

What to Watch

- Whether AfDB/SEFA publishes its list of selected Green Hydrogen Programme awardees, and whether any Sudanese entity is among them.
- Progress on South Africa's Coega project toward its targeted Q3 2027 FID — currently the pipeline's most advanced test of whether an African hydrogen project can reach bankability.
- Whether Sudan's Ministry of Irrigation and Water Resources or Ministry of Energy and Petroleum follows Geddo's Cairo remarks with a formal domestic hydrogen or green-ammonia policy position.
- Movement on the "integrated African framework" for hydrogen policy, standards, and certification that Ashour called for in Cairo — a continental coordination gap the IEA's FID data suggests is currently unfilled.

Sourcing & Next Update

Primary: attqa.net, "الخبير: 'الهيدروجين الأخضر في أفريقيا يحتاج رؤية تتجاوز التصدير إلى التصنيع المحلي'" ("Experts: Green Hydrogen in Africa Needs a Vision Beyond Export to Local Manufacturing"), 13



August 2026. Secondary: Energy Transition Africa, "Africa's Green Hydrogen Pipeline Has Almost No Final Investment Decisions," 27 July 2026, citing the IEA's *Global Hydrogen Review 2026*; African Development Bank, "African Development Bank's Sustainable Energy Fund for Africa Launches Call for Proposals for New Green Hydrogen Programme," 8 April 2026.

3Bi will publish a follow-up if SEFA's Green Hydrogen Programme awardees are announced or if Sudan's government issues a formal position on domestic hydrogen policy.

This piece was produced through 3Bi's automated daily publications workflow, which monitors regional and international climate reporting.

This publication is produced with support from 3Bi's institutional donors; see the full funder list at 3bisudan.org.

Suggested citation: 3Bi Research Team (2026). "Africa's Green Hydrogen Pipeline: One Investment Decision Out of 31 Projects. Sudan Says Water and Food Come First." 3Bi Publications, 14 August 2026.