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Africa's Carbon Markets Are Moving from Readiness to Delivery. Sudan Has the Technical Groundwork and No Way to Cash It In.

Sudan has the technical groundwork. It has no way to cash it in.

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Africa's carbon markets are shifting from readiness to delivery ahead of October's Kigali summit. Sudan has the technical groundwork — but war has stalled the institutions needed to turn it into revenue.

The Hook

In October, more than ten African governments and over twenty investors and financiers will sit down in Kigali, Rwanda, for the Carbon Markets Africa Summit (CMAS) 2026 (13–15 October 2026), a gathering organizers describe as the moment Africa's carbon markets stop rehearsing and start transacting (APO Group/VUKA Group, 21 August 2026). Sudan will not be one of the governments at the table — not because it lacks the technical foundation to compete, but because two years of war have made it impossible to turn that foundation into a functioning market. That gap, more than any lack of forests or sunlight, is what will keep Sudan locked out of one of the few post-war revenue streams that does not require rebuilding a single power line or port first.

The Argument

First, Africa's carbon market is shifting from pilot projects to real transactions, and the money is starting to follow. CMAS 2026, hosted by Rwanda's Ministry of Environment with UNDP and the African Development Bank as host organizations, is built around a single question its organizers pose directly: what makes a project "bankable, insurable and verifiable"? (APO Group, 21 August 2026). The African Union's Africa Action Plan on Carbon Markets and AUDA-NEPAD's African Principles for Equity and Integrity in Carbon Markets are pushing member states from readiness toward delivery, while the African Carbon Markets Initiative is targeting \$6 billion in annual credit revenue by 2030, rising toward a projected \$120 billion by 2050 (carboncredits.com, 2026). Ghana is building out Article 6 project pipelines and authorization systems; Kenya already dominates the continent's voluntary market; Gabon has banked \$17 million from a \$150 million, ten-year Central African Forest Initiative agreement for protecting its share of the Congo Basin (African Business; allAfrica, 2026). This is no longer a conference-circuit conversation. It is a market with governments, standards bodies, and more than twenty named investors and financiers converging on one Kigali agenda.

Second, Sudan already has more of the technical groundwork than its absence from that agenda suggests. Sudan has been a founding member of the Eastern Africa Alliance on Carbon Markets and Climate Finance since the alliance's launch in June 2019, alongside Burundi, Ethiopia, Kenya, Rwanda, Tanzania and Uganda — the same regional bloc now feeding governments and pipelines into CMAS. Sudan also holds the continent's proof of concept in miniature: the Darfur Low Smoke Stoves Project, the first carbon-credit program ever registered in the country, which is



delivering 10,000 LPG cook stoves to Sudanese households and is projected to cut more than 300,000 tonnes of CO₂-equivalent over ten years, while reducing the smoke-inhalation deaths and deforestation pressure tied to charcoal cooking (UNFCCC Momentum for Change). Most strikingly, Sudan kept its climate-reporting obligations alive through the war itself: after the 2023 conflict made it impossible to complete planned ground-based forest measurements, Sudan's Forest National Corporation worked with the University of Maryland to calibrate NASA's GEDI satellite laser data against its existing field plots, becoming the first country anywhere to formally integrate space-borne LiDAR into a national Forest Reference Level submission. Sudan filed that FRL with the UNFCCC in 2025 and completed technical assessment in early 2026 — an outcome FAO's own forestry officer called a case of a country becoming "a pioneer in using geostatistical modeling to integrate satellite data innovatively" while under conflict (FAO Forest Monitoring blog, 24 April 2026).

Third, none of that technical resilience is converting into the institutional and financial infrastructure that actually moves money. A Forest Reference Level and one 10,000-stove pilot are inputs into a carbon market, not a market themselves. CMAS 2026's own agenda names the ingredients still missing for any African country to attract capital at scale: credible measurement, reporting and verification (MRV) capacity, compliance-readiness, registry interoperability, and "transaction certainty" that only functioning institutions can supply (APO Group, 21 August 2026). Sudan's Ministry of Environment cannot easily send a delegation to negotiate offtake agreements while the country remains split between competing authorities; a bankable REDD+ or mini-grid carbon project needs land-tenure clarity, a functioning national registry, and investors willing to underwrite political risk — none of which exists at scale in Sudan today. The Eastern Africa Alliance membership and the FRL submission prove Sudan's technical teams can still do the work. They do not prove Sudan's government can currently do the deal.

Why It Matters to the Reader

For donors and the Alliance's regional partners, the lesson of Sudan's cookstove project and its wartime FRL submission is that "conflict-affected" and "carbon-market-ready" are not mutually exclusive categories — a distinction CMAS 2026's own investor community, several of whom are represented in the room via the UNEP-hosted Nature Deal Room, will need if they want early access to a market before it gets crowded. For the Sudanese government and its technical ministries, the message is more urgent: forest and emissions data that meets UNFCCC standards has a shelf life, and a Forest Reference Level completed in early 2026 is a live asset only for as long as someone can build a project pipeline, a national registry and an investor-facing offer around it. Every CMAS cycle that passes with Sudan absent from the room is a cycle in which Ghana, Kenya and Rwanda lock in the standards bodies, ratings agencies, and buyer relationships that make later entry harder and more expensive. Sudan's technical teams did the hardest part of the work — reporting through a war using a novel satellite methodology that impressed FAO's own reviewers. The institutional and financial follow-through is the part that



requires peace, or at minimum a bridging mechanism from the Alliance and donors willing to treat Sudan's absence from Kigali as a solvable problem rather than a foregone one.

Close

CMAS 2026 will spend three days in October asking what makes an African carbon project bankable. Sudan's own data — a founding Alliance membership, a working cookstove project, and a war-tested satellite methodology FAO called pioneering — is one part of that answer already sitting on the table. What is missing is someone in the room to make the case.

This piece was produced through 3Bi's automated daily publications workflow monitoring 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 Carbon Markets Are Moving from Readiness to Delivery. Sudan Has the Technical Groundwork and No Way to Cash It In. 3Bi.

Publisher: 3Bi Research Team

Location: Khartoum, Sudan