



AFRICA E-MOBILITY WEEK



2025 Continental Signals

Prepared by the Africa E-Mobility Alliance | AfEMA

The Implementation Decade

Africa's e-mobility transition is no longer waiting on technology, on policy direction, or on capital availability. It is waiting on the systems that turn them into scale.

2026 is the year those systems begin to take shape – unevenly, and with consequence.

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Drawing on AEW2025 – Africa E-Mobility Week, Addis Ababa, October 2025





01 | THE INFLEXION POINT

Across the continent, e-mobility has moved from question to operation. Ethiopia has banned the importation of internal combustion vehicles. Rwanda has restricted internal combustion motorcycles in Kigali. Kenya is deep into national tariff reform. More than 200 e-mobility companies are now operating across Africa. The conversation has changed.

In the leading markets, what was a debate about whether electric mobility could work in African conditions has become a question of how fast it can scale, who captures the value, and which markets emerge as continental leaders. Technology is no longer the binding constraint. Policy direction is largely in place. Capital is, for the first time, present in meaningful volume.

And yet, the transition is advancing unevenly. The difference between leading and lagging markets is now widening rather than narrowing, and within markets, deployment is constrained not by what is missing in any single domain, but by what is missing between them.

The continent's e-mobility transition is no longer constrained by capital availability. It is constrained by the ability to structure and deploy capital at scale.



This was a diagnosis emerging from the Africa E-Mobility Week (AEW) in Addis Ababa in October 2025, an event that convened policymakers, investors, founders, and operators over four days of structured dialogue. It is also the diagnosis of every operator currently trying to grow past pilot. The next phase will not be defined by ambition alone, but by execution, in markets that are now visibly diverging.

The conversations at AEW2025 surfaced three gaps that will determine which markets accelerate into scale: the Execution Gap between policy and operational reality, the Bankability Gap between innovation and investable scale, and the Integration Gap between technical components and working systems.

These are the questions that will define the year ahead. They are also the questions AEW2026 in Cape Town, 28–30 September, has been built to take forward.

BY THE SIGNALS

<p>150,000+ EVs deployed across leading African markets</p>	<p>\$620M+ Disclosed e-mobility investment into Africa</p>	<p>6 of 11 Leading markets now have a national e-mobility strategy</p>	<p>2,000+ Battery swap stations across African markets</p>
<p><i>AfEMA tracking, 11 markets, 2025–26</i></p>	<p><i>AfEMA tracking, 2020–2026</i></p>	<p><i>AfEMA Policy Index, 2026</i></p>	<p><i>AfEMA tracking, 11 markets, 2025–26</i></p>



02 | THE EXECUTION GAP

POLICY AMBITION → OPERATIONAL REALITY

In the leading markets, policy is largely in place. Implementation is now where progress will be measured

Ethiopia, Rwanda, and Kenya have each crossed thresholds few would have predicted five years ago. Ethiopia's 2024 ban on imports of internal combustion vehicles is the most ambitious supply-side intervention on the continent. Rwanda's Kigali motorcycle restrictions move beyond pilot into binding policy. Kenya's e-mobility implementation process, among the most consequential e-mobility policy negotiations underway in East Africa, is testing whether utilities, regulators, and operators can move together at the pace markets require.

The policy momentum extends beyond the headline cases. Across the eleven leading African e-mobility markets we track, six now operate national e-mobility strategies, and active fiscal incentives are in force in nearly all of them. Three countries, Kenya, Egypt, and Rwanda, have introduced dedicated e-mobility electricity tariffs. The architecture is taking shape. Whether it can be operationalised at the pace markets require remains uneven across the group.

The first pressure point is inter-ministerial coordination. Transport ministries set vehicle targets that energy ministries must enable, finance ministries must cost, industry ministries must align with industrial policy, and city governments must implement. Where this coordination has been institutionalised, e-mobility moves forward; where it has not, ambition stalls in the gap between the gazette and the ground.

The second is the fiscal sustainability of incentives. Import duty reductions and VAT exemptions accelerated early adoption, but markets that design transition pathways rather than incentive cliffs are likely to keep adoption curves intact as fuel-tax revenues decline.

The third is regulatory predictability. Investors and operators are not asking for perfect regulation but for stable regulation. Markets with imperfect rules that hold for several years tend to be more deployable than those whose rules change frequently.

WHAT THIS MEANS

FOR GOVERNMENTS

Implementation capacity is becoming the differentiator between markets, alongside policy ambition. The countries that institutionalise cross-ministry coordination are positioning themselves to move from regional players to continental leaders. The window for that positioning is opening in 2026.

FOR INVESTORS

Regulatory predictability is increasingly the precondition for capital deployment at scale. Markets that close the execution gap fastest tend to become destinations for continental capital, with early-mover advantages compounding.

FOR FOUNDERS

Ventures that thrive in 2026 will be those that can navigate institutional complexity, not just deploy technology. Regulatory fluency is becoming a competitive moat.

03 | THE BANKABILITY GAP

Innovation → investable scale

E--mobility is not a vehicle category. It is an infrastructure system. Across the leading markets, components are being deployed faster than they are being assembled into systems that work.

Charging infrastructure does not function without grid coordination. Battery deployment does not function without lifecycle management. Fleet electrification does not function without depot infrastructure, energy planning, and route-level operational redesign. Freight electrification does not function without corridor-level planning across borders. None of these is a technology problem. They are integration problems.

Battery swap networks illustrate what integration at scale can look like. Spiro alone now operates more than 1,200 stations across six African countries, with Kenya hosting 300+ swap points and Uganda 200+. Where energy supply, vehicle finance, and operator economics have integrated, deployment has accelerated. Grid readiness varies sharply across the markets we track: Rwanda's average annual outage of 8.5 hours sits next to South Africa's average of 48.5 hours. Integration models need to be built for the existing grids.

Battery lifecycle management is moving from secondary concern to first-order priority. Three of the eleven leading markets, Kenya, South Africa and Rwanda, have adopted either Extended Producer Responsibility frameworks or have adjacent e-waste regulations that cover lithium batteries. Others will likely need to follow if the continent is to avoid carrying the cost of disposal as deployment scales. Freight electrification, meanwhile, has crossed from concept into early implementation; corridor-based deployment is where the next wave of operational scale is expected to emerge.

Critical mineral value chain capture is the strategic frontier of the decade. Africa supplies disproportionate amounts of the lithium, cobalt, manganese, and graphite that power the global e-mobility transition. Whether the continent captures value through processing and manufacturing or remains an extractive node in someone else's industrial strategy will be shaped by policy choices made now.



WHAT THIS MEANS

FOR GOVERNMENTS

Public capital's highest leverage is in unlocking the missing middle through guarantees, blended structures, and de-risking instruments that crowd in commercial capital. The fiscal cost of inaction can outweigh the cost of well-designed catalytic finance.

FOR INVESTORS

The missing middle is among the highest-return underserved segments on the continent. The opportunity sits with companies past pilot but pre-DFI scale that are uninvested for structural rather than fundamental reasons. The arbitrage will narrow as more sophisticated investors enter.

FOR FOUNDERS

Capital structuring is becoming as important as capital quantity. Founders who understand asset separation, embedded finance, and segment economics tend to raise on materially better terms.





04 | THE INTEGRATION GAP

Components → working systems

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WHAT THIS MEANS

FOR GOVERNMENTS

Cross-ministry coordination, not limited to transport, energy, finance, industry, and environment, is becoming the binding constraint. Single-ministry strategies are reaching their ceiling. Continental leadership in the years ahead is likely to come from governments that build genuine integration architecture.

FOR INVESTORS

Integrated assets tend to be bankable; fragmented ones less so. Investors should look at business models that integrate vehicle, energy, payments, and policy into a single system. Critical minerals, battery lifecycle, and freight corridors are among the highest-conviction integration plays of the decade.

FOR FOUNDERS

The next phase rewards ventures designed for system integration from day one across interoperable batteries, embedded finance, and regulated operations. Standalone technology plays without systems thinking is likely to be acquired or eclipsed.

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05

CAPE TOWN, 28–30 SEPTEMBER 2026

Where the conversation continues

AEW2026 is built to carry the three gaps forward.

Africa E-Mobility Week is the continent's premier e-mobility convening. It's a working session where governments set policy, investors deploy capital, and founders building companies engage with the same questions in the same room over three days.

The 2026 programme is organised around the three gaps. The Execution Gap shapes the Forum Stage agenda, where policymakers, regulators, and senior officials will examine implementation, regulatory predictability, and continental coordination. The Bankability Gap drives the Accelerator Stage, the AEW Dealroom, where the missing middle will be addressed directly through curated startup pitches, government investment pitches, and a reverse-pitch session in which funders make their case to founders. The Integration Gap shapes the Solutions and Collaboration stages, where lifecycle management, freight electrification, critical minerals strategy, and infrastructure systems will be worked through with the people building them.

AEW2026 is driving beyond being a conference about Africa's e-mobility transition. It is where the conversations that began at AEW2025 continue, with the markets, capital, and institutions now visibly engaged.



Engaging with AEW2026

Governments and regulators seeking peer exchange on implementation, fiscal design, and regional coordination are invited to engage AfEMA directly to shape participation. Investors and funders interested in the missing middle, the AEW Dealroom, or sponsorship of the convening are invited to an early conversation. Sponsorship and investor partner positions are limited and curated.

Founders building in commercial fleets, freight, battery systems, charging, or embedded finance can apply for the curated 2026 pitch sessions, which open in June. Researchers and ecosystem partners are invited to engage on Africa E-Mobility Signals and the AEW2026 programme.

Africa E-Mobility Week 2026 · Cape Town · 28–30 September <https://africaemobilityweek.org/>

Continental data in this brief draws on AfEMA's tracking of 11 leading African e-mobility markets: Benin, Egypt, Ethiopia, Kenya, Morocco, Nigeria, Rwanda, Senegal, South Africa, Togo, Uganda. Coverage will expand in future issues. Drawing on the AEW2025 post-event report. · © AfEMA 2026. Cite as: AfEMA (2026), Africa E-Mobility Signals 01: The Implementation Decade.

