AFRICA E-MOBILITY WEEK

2025 REPORT

Convened by the Africa E-Mobility Alliance | AfEMA

& the Africa E-Mobility Forum

Co-convened by

United Nations Environment Programme & AfEMA

This publication, Africa E-Mobility Week 2025 Report, presents key discussions, announcements, partnerships, and outcomes from Africa E-Mobility Week 2025, including the Africa E-Mobility Forum convened in collaboration with the United Nations Environment Programme (UNEP).

Africa E-Mobility Week is an initiative of the Africa E-Mobility Alliance (AfEMA), bringing together policymakers, industry leaders, investors, development partners, and innovators to advance sustainable electric mobility across Africa. The Africa E-Mobility Forum serves as a high-level platform for policy dialogue and strategic engagement convened in partnership with UNEP.

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01 | EXECUTIVE SUMMARY

AEW2025 in Context

Africa E-Mobility Week 2025 (AEW2025) took place at a point where electric mobility across the continent is moving beyond early pilots into initial phases of scale and system integration. Within this context, the United Nations Environment Programme (UNEP) and the Africa E-Mobility Alliance (AfEMA) co-convened the Africa E-Mobility Forum 2025 (the Forum) during AEW2025 to advance dialogue on the policies, partnerships, and investments needed to support the sector's next phase of growth.

Several countries are demonstrating policy leadership. Ethiopia's restrictions on internal combustion vehicle imports, Kenya's advancing national e-mobility policy framework, and Rwanda's restrictions on internal combustion motorcycles in Kigali reflect a shift from policy exploration toward implementation. At the same time, interest in regulatory instruments and regional coordination is increasing, indicating early steps toward a more aligned policy environment.

AEW2025 and the Forum were designed to support this transition by convening public institutions, private sector actors, investors, development partners, researchers, and civil society. The programme focused on how policy direction, market innovation, and financing mechanisms can be aligned to support scalable, inclusive, and resilient e-mobility systems across African markets.

Key Outcomes and Forward-Looking Signals

This report synthesises areas of convergence across Forum discussions. Africa's e-mobility transition is no longer constrained by technology, but by the alignment of systems required to support scale.

The transition is advancing unevenly but decisively, with several cross-cutting signals emerging.

Policy frameworks are increasingly in place in leading markets, but implementation capacity remains a critical constraint. Progress will depend on stronger institutional coordination, targeted technical support, and mechanisms for peer learning to enable replication across countries.

Private capital continues to drive market growth, with increasing investment in vehicles, assembly, and consumer financing models. Financing structures are evolving, including greater use of blended finance and debt instruments. However, gaps remain, particularly for early-stage companies and for public and shared infrastructure. Greater engagement from development finance institutions and local financial actors will be essential to unlocking scale.

Market activity is expanding rapidly. More than 200 e-mobility companies are now operating across Africa, with strong concentration in East and West Africa and growing activity in Southern and North Africa. Deployment is focused on shared, commercial, and public transport segments. As markets mature, interoperability, localisation, and regional expansion are becoming more prominent.

Inclusion and sustainability considerations are gaining importance. Gender participation, skills development, and battery lifecycle management are increasingly recognised as integral to long-term sector development. While private sector actors are beginning to respond, policy frameworks and institutional support remain limited in many contexts.

New areas of opportunity are emerging alongside early deployment. Freight electrification, carbon finance, and critical minerals value addition are gaining momentum, although still at early stages. These areas will require coordinated policy direction, investment, and research to develop sustainably.

Overall, Africa's e-mobility transition will not follow a single pathway. Progress will depend on differentiated national strategies, sustained collaboration, and alignment between policy ambition, market realities, and financing structures.

The transition is moving from experimentation toward early-scale deployment. The next phase will be defined by implementation, coordination, and the ability to build systems that support scale.

02 | INTRODUCTION

AEW is a continental convening platform led by the Africa E-Mobility Alliance (AfEMA), established to advance the adoption of electric mobility across Africa through policy dialogue, market development, and multi-stakeholder collaboration. AEW brings together governments, development partners, financiers, industry leaders, innovators, and civil society to support practical and scalable solutions that advance sustainable transport, economic development, and climate action.

The Forum is part of the Africa Support and Investment Platform for E-Mobility managed by the United Nations Environment Programme (UNEP) to support African countries in advancing inclusive and sustainable zero emission mobility systems. The Forum provides a structured space for high-level dialogue and technical exchange, with a focus on strengthening policy and regulatory frameworks, mobilising investment, and building institutional and technical capacity in support of national and regional e-mobility objectives.

In 2025, AEW was held from 13–16 October, bringing together stakeholders through a programme of policy dialogue, technical sessions, industry engagement, and networking activities.

The Forum 2025, held on 15–16 October, constituted the core two-day policy programme within AEW2025.

The 2025 edition marked a significant milestone in collaboration between UNEP and AfEMA. This co-convening approach strengthened linkages between policy priorities and industry-led implementation pathways, while maintaining clear institutional roles and responsibilities.

03 CONVENING FRAMEWORK AND PARTNERSHIPS

Ethiopia as Host Country

AEW2025 was hosted in Ethiopia through a collaborative convening involving AfEMA, UNEP, and the Ministry of Transport and Logistics (MoTL), Ethiopia.

Ethiopia's selection as host country reflected its emerging leadership in sustainable mobility policy. In particular, Ethiopia has taken a pioneering step by banning the importation of internal combustion engine (ICE) vehicles from 2024 and launching its National E-Mobility Strategy and Implementation Plan (2025–2030). This policy direction, combined with Ethiopia's renewable energy profile and growing interest in domestic e-mobility value chains, positioned Addis Ababa as a relevant and credible setting for continental dialogue.

As the host city of the African Union Commission (AUC) and the United Nations Economic Commission for Africa (UNECA), Addis Ababa provided a unique institutional context. This enabled AfEMA and UNEP to convene national governments, regional institutions, development partners, and private sector actors within a single policy and diplomatic environment at a UN conference facility.

The MoTL played a central coordinating role, supporting government participation, enabling field visits, and formally presenting Ethiopia's National E-Mobility Strategy during the Forum. Senior political leadership was demonstrated through the participation of H.E. Dr. Alemu Sime Feyisa, Minister of Transport and Logistics, and H.E. Bareo Hassen, State Minister, who contributed to opening remarks and strategic discussions.

Strategic and Institutional Partners

AEW2025 and the Forum were supported by a range of strategic and institutional partners whose engagement strengthened its policy relevance, technical depth, and implementation focus.

At the national level, the MoTL served as the primary government counterpart, supporting high-level participation and contributing to policy-focused discussions. National and city-level institutions, including the Addis Ababa City Transport Authority, provided perspectives on urban transport governance and implementation.

Technical expertise and side visits were further supported by ITDP Africa, contributing insights from public transport electrification and bus rapid transit infrastructure, strengthening applied discussions related to mass transit and systems planning.

At the continental and regional level, the AUC and UNECA were represented through senior-level participation, reflecting alignment with broader transport, energy, and regional integration agendas.

Strategic partners, including CPCS and MobilityX Africa, contributed to programme elements focused on investment readiness, market development, and enabling frameworks, helping to bridge policy dialogue with practical implementation pathways.

Our partners reinforced AEW2025 and the Forum's role as a platform for policy dialogue, knowledge exchange, and coordination across national, regional, and technical stakeholders.

04 | PARTICIPATION OVERVIEW

Delegates, Speakers, and Exhibitors

AEW2025 convened 361 in-person delegates representing over 35 countries across Africa, Europe, Asia, and North America. Participation reflected a multi-stakeholder composition, bringing together public-sector institutions, private-sector actors, financiers, development partners, academia, civil society, and media. Gender representation included 264 male delegates (73.1%) and 97 female delegates (26.9%), highlighting both progress and the continued need to strengthen women's participation in Africa's electric mobility ecosystem. The Forum programme featured more than 50 speakers and panellists, including ministers, senior government officials, regional institutions, researchers, industry leaders, and investors.

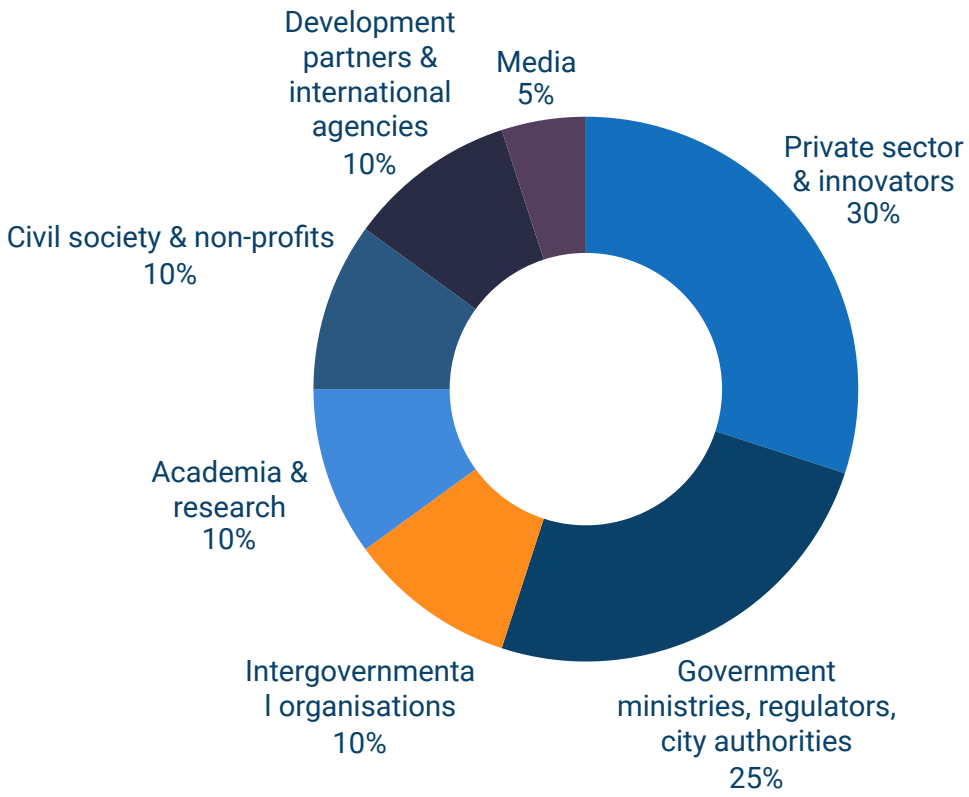
The Technology Exhibition hosted over 20 organisations, showcasing electric vehicles across multiple weight classes, charging infrastructure, battery technologies, digital platforms, and enabling services. Exhibitors included African and international companies, early-stage innovators, and established market players.

Regional and Sectoral Representation

Participation spanned the continent, with additional representation from Europe, Asia, and North America. This geographic breadth enabled comparative exchange across markets at different stages of policy development, infrastructure readiness, and e-mobility adoption, strengthening cross-regional learning and partnership formation.

Based on registration data, sectoral representation among delegates was distributed approximately as follows:

- **360+** Delegates | AEW2025 and the Forum convened a diverse cross-section of stakeholders from across the mobility ecosystem.
- **50+** High-level speakers including ministers, academics, innovators, and financiers.
- **35** Countries Represented by delegates joining fro all four regions of Africa, in addition to delegates from Europe, Asia and North America
- **20+** Exhibitors



05 PRE-EVENT SIGNALS AND STAKEHOLDER ENGAGEMENT

AEW2025 included pre-event engagement activities designed to support agenda-setting, capacity building, and stakeholder mobilisation. These activities comprised a continental webinar series, a Youth Summit, and targeted preparatory engagements delivered under the “Road to AEW2025”.

Together, these initiatives broadened participation beyond in-person delegates, informed programme design, and strengthened readiness for the Forum.

Pre-Event Webinar Series

Ahead of AEW2025, AfEMA delivered a three-part webinar series to support early agenda-setting and stakeholder engagement across Africa’s electric mobility ecosystem. The series convened policymakers, private-sector operators, investors, development partners, utilities, and youth innovators to explore key issues shaping the sector, including carbon finance, charging infrastructure, grid readiness, and market development.

Across the series, more than 900 participants registered from across Africa, Europe, and other regions. Insights from the webinars helped inform several discussions during AEW2025.

Webinar 1

Article 6 and E-Mobility | Carbon Finance Pathways for Africa's Clean Transport Future

Date: February 2025
Partners: Zeroca and Verst Carbon

This webinar explored the potential role of carbon markets, particularly under Article 6 of the Paris Agreement, in supporting electric mobility deployment in Africa. Discussions examined practical considerations for developing carbon-creditable transport projects, including vehicle aggregation models, measurement, reporting and verification (MRV), and regulatory readiness.

The session recorded 393 registrations and 192 live participants, reflecting strong interest from policymakers, private-sector actors, and development partners.

Key insights included:

- Carbon finance can provide a complementary revenue stream for EV fleets, charging infrastructure, and two- and three-wheeler deployment.
- Aggregation of electric vehicles is critical to achieving the scale required for viable carbon credit projects.
- Governments require targeted technical support to establish baselines, MRV systems, and additionality frameworks.

The discussion informed several AEW2025 sessions on carbon finance pathways and blended finance approaches for e-mobility scale-up.

Webinar 2

Charging Change – Building Africa's EV Ecosystem from Grid to Garage

Date: May 2025
Partner: Spiro

This webinar examined the technical and operational dimensions of electric mobility deployment, with a focus on charging infrastructure, battery systems, grid readiness, and workforce development. The discussion highlighted operational challenges faced by companies scaling e-mobility solutions across diverse African markets.

The webinar recorded 322 registrations from more than 15 countries, reflecting strong participation from industry operators, utilities, policymakers, and technical experts.

Key insights included:

- Battery-swapping models can be commercially viable when designed around operational reliability and user experience.
- Grid readiness requires early coordination with utilities and data-driven infrastructure planning.
- Infrastructure deployment must be adapted to informal and high-utilisation transport segments, particularly electric two-wheelers.

Insights from this session informed Solutions Stage discussions at AEW2025, particularly those addressing charging infrastructure deployment, grid integration, and skills development.

AEW2025 Youth Summit | The Youth Imperative

Date: October 2025
Principal Partner: WTS Foundation / WTS Energy
Supporting Partners: ROAM, Kuehne Climate Centre

The AEW2025 Youth Summit formed a key component of the Road to AEW2025, providing a platform to engage young professionals, students, innovators, and emerging leaders in Africa's sustainable mobility transition. The Summit focused on strengthening the pipeline of skills, innovation, and leadership needed to support the long-term growth of Africa's electric mobility ecosystem while ensuring that youth perspectives are integrated into policy, market, and implementation discussions.

The Summit recorded 273 registrations and 121 live participants from 39 countries, reflecting strong interest from across Africa and the diaspora.

Key insights included:

- Youth leadership and ownership: Empowering young engineers, entrepreneurs, and professionals to design, build, and operate Africa's mobility systems is essential to the sector's long-term development.
- Skills development and workforce readiness: Strong demand exists for cross-disciplinary skills spanning infrastructure deployment, data systems, policy design, and operational management.
- Continental and diaspora collaboration: Diaspora engagement can support knowledge exchange, skills transfer, and investment in emerging e-mobility markets.
- Structured entry pathways: Participants highlighted the importance of clearer entry points into the sector through training programmes, mentorship networks, and access to early-stage finance.

Virtual Pitch Bootcamp for African EV Start-ups

Date: October 2025
Lead Organiser & Delivery Partner: Clean Technology Hub (Energy Innovation Centre)

The Virtual Pitch Bootcamp formed part of the pre-event engagement activities for AEW2025, with a focus on strengthening the readiness of early-stage electric mobility ventures participating in the Forum's pitch sessions. The session was designed to support start-ups and pre-seed companies in refining their investment narratives and improving the clarity of their business propositions.

The bootcamp focused on key elements of investment readiness, including value proposition development, market positioning, and pathways to scale within African mobility contexts. Participating ventures were supported in aligning their solutions with investor expectations while grounding their approaches in local market conditions.

Led and delivered by the Clean Technology Hub (Energy Innovation Centre), the session drew on practical experience in venture development and innovation support within African clean technology ecosystems.

Delivered in advance of the Forum, the bootcamp contributed to improving the overall quality and preparedness of ventures engaging with investors, partners, and ecosystem stakeholders at AEW2025.

Key insights included:

- **Investment readiness gaps:** Early-stage ventures require targeted support to clearly articulate value propositions and demonstrate credible pathways to scale.
- **Market alignment:** Strong alignment between business models and local market conditions remains critical to investor confidence and deployment potential.
- **Pipeline strengthening:** Pre-event capacity-building can improve the quality of ventures participating in pitch sessions and enhance engagement outcomes.
- **Role of ecosystem enablers:** Innovation hubs and support organisations play a critical role in preparing ventures for investment engagement and market entry.

Road to Addis – Demonstrating Africa's E-Mobility Potential in Practice

Dates: September–October 2025
Lead Organisers: Intro Africa, Thought Leader Africa
Platinum Energy Partner: Munja Energy
Grid Access Support: Kenya Power and Ethiopian Electric Utility

The Road to Addis initiative served as a flagship pre-event mobilisation campaign for AEW2025, combining storytelling, community engagement, and real-world demonstration to build momentum ahead of the Forum. The initiative was designed to demonstrate that electric mobility is a practical and scalable solution across regional transport corridors when infrastructure, coordination, and partnerships are aligned.

Spanning more than 1,600 kilometres from Nairobi to Addis Ababa, the convoy travelled through urban centres, rural communities, and universities. Electric vehicles and motorcycles were demonstrated across diverse terrain and infrastructure contexts, illustrating the potential for a clean and connected East African transport corridor.

Over the course of eight days, the convoy conducted public demonstrations, community dialogues, and institutional engagements, connecting electric mobility to everyday concerns such as transport costs, air quality, livelihoods, and energy access.

Photo credit: INTRO:AFRICA

Key insights

- **Regional corridor potential:** Electric mobility solutions can operate effectively across long-distance regional transport corridors when supported by coordinated infrastructure planning.
- **Cross-border coordination challenges:** Charging logistics, customs procedures, and operational planning highlighted the need for harmonised regional standards and regulatory coordination.
- **Infrastructure readiness:** Access to grid infrastructure and charging support remains a critical enabler for corridor-based electric mobility deployment.
- **Public awareness and adoption:** Community engagement along the route demonstrated growing interest in clean mobility solutions across both urban and rural settings.

Collaborators

2025

THE FORUM

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06 THE FORUM OVERVIEW AT AEW2025

Addis Ababa | 15 - 16 October 2025

Co-convened by the United Nations Environment Programme (UNEP) & Africa E-Mobility Alliance (AfEMA)

UN environment programme

The Forum 2025 constituted the core policy programme within AEW2025, convening policymakers, industry leaders, investors, development partners, researchers, and civil society organisations to examine pathways for scaling electric mobility across Africa. Discussions explored the policy frameworks, financing mechanisms, infrastructure systems, and market innovations required to support the continent's evolving electric mobility ecosystem.

The Forum programme was structured across four thematic stages designed to facilitate dialogue across policy, investment, and implementation dimensions of the sector.

Forum Stage

Focused on regulatory frameworks, public policy development, and government leadership in advancing electric mobility across African markets.

Solutions Stage

Showcased technical innovations and operational approaches across vehicles, charging infrastructure, battery systems, and digital platforms supporting electric mobility deployment.

Accelerator Stage

Highlighted entrepreneurship, investment readiness, and emerging business models supporting market development and scaling of electric mobility companies.

Collaboration Stage

Provided a platform for dialogue on cross-sector partnerships, regional coordination, and ecosystem development across policy, industry, and development actors.

Each stage was guided by experienced moderators who facilitated dialogue among speakers and participants, helping to ensure structured and practical discussions throughout the Forum.

Stage Moderators

Annika Berlin, UNEP

Gashaw Aberra, ITDP Africa

Anabelle DiCarlo, CPCS

Stuart Minaar, MobilityX Africa

Naville Geiriseb, Agora Verkehrswende

While discussions were organised across thematic stages, the insights presented below synthesise key themes emerging across the Forum as a whole rather than summarising individual sessions. This approach reflects areas of convergence across multiple discussions and highlights signals relevant to policymakers, investors, and market actors shaping Africa's electric mobility transition.

Policy and Regulation

Policy Leadership and Transition Planning

Discussions across the Forum Stage highlighted the central role of policy leadership in accelerating Africa's transition to electric mobility. While technology solutions and private sector innovation are advancing rapidly, a consistent theme emerging from discussions was that the pace and effectiveness of policy implementation continue to vary across markets, shaping the speed and scale of sector development.

A strong signal from the Forum was the growing political commitment among African governments to embed e-mobility within broader economic and industrial development strategies. Across multiple sessions, participants pointed to a shift from pilot-based approaches toward more structured, nationally coordinated transition planning.

The launch of Ethiopia's E-Mobility Strategy and Implementation Plan (2025–2030) illustrated this progression. The strategy outlines ambitious targets for vehicle electrification, charging infrastructure deployment, and domestic manufacturing, supported by a coordinated implementation framework spanning multiple public institutions. This was widely referenced as an example of how policy can move beyond ambition toward actionable roadmaps.

From Policy Ambition to Implementation

At the same time, translating policy ambition into coordinated, cross-agency implementation remains an ongoing process in several markets. Institutional alignment, clarity of mandates, and effective inter-ministerial coordination were identified as important factors influencing the pace at which policies are operationalised.

Regional Integration and Market Scale

Participants also highlighted that fragmented national markets continue to constrain investment and manufacturing scale. Many African markets remain relatively small when considered individually, limiting their ability to support large-scale production or sustained private sector investment.

In this context, regional integration through the African Continental Free Trade Area (AfCFTA) was consistently identified as a critical mechanism for aggregating demand, supporting the harmonization of standards including vehicle specifications and battery systems and reducing cross-border trade barriers. Strengthened coordination across regional economic communities and institutions was seen as essential to creating more predictable and scalable market conditions.

Fiscal Policy and Incentive Design

Fiscal policy emerged as another important factor influencing adoption trajectories. Evidence shared during the Forum demonstrated that targeted fiscal measures such as import duty reductions, VAT exemptions, and targeted incentives can play a significant role in accelerating electric vehicle uptake, particularly in early-stage markets.

However, participants also emphasised the importance of designing incentive structures that remain fiscally sustainable over time, particularly as governments begin to consider the long-term implications of reduced fuel-based tax revenues. Balancing short-term market stimulation with long-term fiscal resilience was identified as an important policy consideration.

Institutional Capacity and Data Systems

Discussions emphasised that effective policy implementation is closely linked to institutional capacity. In several markets, limitations related to technical expertise, access to reliable and localised data, and coordination across agencies continue to influence the speed and consistency of policy execution.

Strengthening research institutions, investing in data systems, and building technical capacity within public institutions were identified as important priorities to support evidence-based policymaking and regulatory stability.

Aligning Policy with Market Realities

Across discussions, participants also underscored the importance of aligning policy frameworks with private sector realities, ensuring that regulatory environments are both enabling and responsive to evolving business models. This includes considerations around licensing, standards, and operational frameworks for emerging segments such as battery swapping, fleet electrification, and distributed charging systems.

Overall Insight

Africa's e-mobility transition will depend not only on continued policy ambition, but on the development of coherent, well-coordinated, and regionally aligned policy frameworks that provide clarity for investors, support industrial development, and enable sustainable market growth over the long term.

Finance as the Determinant of Scale

Finance emerged as the central determinant of whether Africa's e-mobility transition can move from early momentum to sustained scale. The constraint is no longer capital availability, but how capital is structured, deployed, and aligned with market realities.

Across the Forum, technological progress, entrepreneurial activity, and policy ambition were all advancing. However, the pace of deployment is governed by the ability to mobilise financing that reflects the operational and risk characteristics of African markets. Finance is therefore not a supporting component of the transition. It is the system condition that shapes adoption, infrastructure rollout, and long-term market viability.

A Structural, Not Liquidity, Challenge

The financing gap is structural rather than a simple shortage of capital. E-mobility markets in Africa are characterised by high upfront costs, long asset lifecycles, evolving business models, and fragmented operating environments. These factors create a risk profile that conventional financing mechanisms are not designed to accommodate.

As a result, even where lifetime cost advantages are clear, particularly in commercial mobility, deployment remains constrained by the misalignment between financing structures and real operating conditions.

The "Missing Middle" as a Binding Constraint

A consistent theme across discussions was the persistence of the "missing middle." Early-stage capital has supported innovation and pilot activity, while development finance institutions are increasingly active in more mature opportunities. Companies operating between these stages continue to face acute constraints.

These firms often demonstrate growing demand, improving unit economics, and increasing operational scale. However, they frequently lack the collateral, track record, or balance sheet strength required to access larger debt facilities. At the same time, commercial lenders remain cautious toward asset-heavy and relatively new business models. This gap between financing needs and available products is now one of the most significant barriers to scale.

Embedded Finance as a Market Enabler

In response, financing is increasingly being embedded directly within e-mobility business models. Structures such as pay-as-you-go, lease-to-own, battery-as-a-service, and usage-based repayment are reducing upfront cost barriers and aligning payment structures with income streams.

These models are typically enabled by digital payments, telematics, and real-time performance tracking. Together, they allow for more adaptive financing structures and improved repayment discipline. In several cases, they are associated with strong repayment performance and more stable operator incomes, particularly in high-utilisation commercial segments.

Commercial Segments as Entry Points for Capital

Investment is currently concentrated in commercial and shared mobility segments, where utilisation rates are higher and revenue streams are more predictable. Across buses, freight, two- and three-wheelers, and logistics fleets, these segments consistently emerged as the most immediately bankable.

Stronger total cost of ownership dynamics, combined with clearer cash flow visibility, enable more viable financing structures. By contrast, private vehicle markets remain constrained by affordability and weaker short-term economic incentives.

Blended Finance and Catalytic Capital

Blended finance is playing a catalytic role in enabling deployment in capital-intensive segments. Concessional capital, guarantees, and technical assistance are helping to improve project viability, reduce perceived risk, and crowd in private investment.

Carbon finance was also discussed as a complementary instrument, particularly in contexts where emissions reductions can be reliably measured and verified. However, these mechanisms are most effective when integrated into broader financing structures. They do not substitute for underlying commercial viability or policy clarity.

Data, Transparency, and Risk Perception

Data and transparency are increasingly central to investment decision-making. Investors require reliable, context-specific data on asset utilisation, operational performance, emissions outcomes, repayment behaviour, and regulatory conditions.

In many markets, the absence of such data increases perceived risk and limits access to capital. Strengthening data systems, monitoring frameworks, and reporting standards is therefore critical. This applies both to investors and to policymakers designing effective incentives and regulatory frameworks.

Capital Structuring and Asset Design

Capital structuring is emerging as a key lever for unlocking investment. In several cases, separating ownership across vehicles, batteries, infrastructure, and operations has improved asset utilisation, collateral quality, and capital efficiency.

At the same time, fragmentation in technical systems, particularly across battery and charging infrastructure, continues to increase capital requirements and reduce utilisation. Greater alignment over time will be essential to improving capital deployment efficiency.

Policy–Finance Alignment

Capital deployment is closely tied to policy certainty and regulatory clarity. Inconsistent incentives, fragmented standards, and unclear industrial strategies can delay or deter investment. Conversely, clear policy direction, including public procurement frameworks, harmonised standards, targeted fiscal measures, and national strategies, can significantly improve investor confidence.

The launch of Ethiopia's E-Mobility Strategy was widely referenced as an example of how coordinated policy direction can support investment mobilisation and structured engagement.

Expanding the Value Chain Opportunity

Investment opportunities are extending beyond vehicles into the broader e-mobility value chain. This includes battery lifecycle management, recycling and second-life applications, logistics systems, component manufacturing, and mineral processing.

Capturing these opportunities will depend on policy sequencing, access to appropriate financing, and regional coordination to achieve scale. Imports remain important for early market development but must be aligned with pathways toward local value creation.

Inclusion and Access to Finance

Access to finance remains uneven across the ecosystem. Women-led businesses, smaller operators, and early-stage companies face additional constraints, including limited access to credit, higher perceived risk, and structural barriers within financial systems.

Expanding access will require more flexible financial products, models adapted to informal and early-stage market conditions, and deliberate efforts to broaden participation across the value chain.

Overall Insight

Africa's e-mobility transition will be determined by how effectively finance is aligned with market realities.

Scaling requires closing the missing middle, structuring capital to match asset and revenue profiles, strengthening data and transparency, prioritising high-utilisation segments, and aligning finance with coherent policy and industrial strategies.

The transition is no longer constrained by capital availability. It is constrained by the ability to structure and deploy capital at scale.

Market Development and the Role of the Private Sector

From Pilots to Structured Market Development

Africa's e-mobility market is moving beyond a pilot phase and entering a more structured stage of development. This transition is being driven primarily by private sector actors, including startups, operators, and service providers.

Market formation is not following a purely state-led pathway. It is being shaped through entrepreneurial activity, with companies testing and adapting solutions in response to local conditions. Progress remains uneven across countries, reflecting differences in policy environments, infrastructure readiness, and access to finance.

Demand Drivers and Commercial Segments

Demand is being driven by economics rather than incentives. Adoption is closely tied to cost savings, income generation, and operational efficiency, particularly in commercial use cases.

This explains why growth is most visible in high-utilisation segments such as two- and three-wheelers, buses, and logistics fleets. These segments offer clearer revenue models and shorter payback periods, making them more attractive to both operators and investors.

Private vehicle uptake remains more limited. Affordability constraints and weaker short-term economic incentives continue to slow expansion in this segment.

Affordability and Embedded Financing Models

Affordability continues to shape market development. High upfront vehicle costs and limited access to credit remain persistent barriers.

In response, companies are embedding financing directly into their service models. Approaches such as pay-as-you-go, lease-to-own, and battery-as-a-service are reducing upfront costs and aligning payments with income streams.

These models are supported by digital platforms, mobile payments, and telematics, allowing repayment structures to adapt to user behaviour. In several cases, this has contributed to strong repayment performance and more stable operator incomes.

Fragmentation and Market Alignment

Market development is taking place within a fragmented landscape. Differences in national policies, standards, incentives, and regulatory approaches continue to create friction, particularly for companies expanding across multiple markets.

Fragmentation is also visible in private sector systems. In the two- and three-wheeler ecosystem, proprietary battery and charging solutions enabled early growth but are now contributing to duplicated infrastructure and lower utilisation.

There is increasing recognition of the need for gradual alignment. Shared infrastructure, partial interoperability, and more coordinated standards are emerging as ways to improve efficiency as markets mature.

Infrastructure Constraints and Business Model Adaptation

Infrastructure and energy constraints are shaping business models in practical ways. Grid reliability, charging availability, and energy costs remain uncertain in many contexts.

Companies are responding by developing models that operate within these constraints, including battery swapping, solar-powered charging, and hybrid systems.

Market development is therefore influenced not only by demand, but by the underlying operating environment. Infrastructure is not simply an enabler. It directly shapes how solutions are designed and deployed.

Coordination Across the Ecosystem

Scaling requires coordination across the ecosystem. Private companies are not expanding in isolation.

Across discussions on public transport, freight, and broader system development, collaboration between companies, governments, financiers, and development partners was consistently identified as essential.

In public transport systems, structured public-private arrangements are critical. In freight and logistics, alignment between shippers, fleet operators, charging providers, and financing partners is required. Market development is increasingly moving from isolated pilots toward integrated, system-level approaches.

From Innovation to Scale

Despite high levels of innovation, moving from early deployment to scale remains a central challenge.

Startups are developing solutions that respond effectively to local conditions, but continue to face constraints linked to regulation, infrastructure, financing, and fragmentation. This gap between innovation and scale defines the current phase of market development.

Activity at the pilot level is widespread. The systems required to support large-scale expansion are still taking shape.

Expanding the Value Chain

Market development is extending beyond vehicles into the broader e-mobility value chain. Opportunities are emerging in battery services, charging infrastructure, maintenance and repair, second-life applications, and digital platforms.

Additional potential exists in processing, manufacturing, and recycling, as highlighted in discussions on critical minerals and local industry.

Capturing these opportunities will depend on policy choices, investment in skills and infrastructure, and coordination across markets to achieve scale.

Imports and Local Industry Development

Imports play an important role in early market formation. Imported electric vehicles, including used vehicles, are enabling access and stimulating demand.

However, this must be aligned with longer-term objectives for local industry development. Without clear pathways toward localisation, there is a risk that markets remain dependent on imports, limiting domestic value creation and employment.

Balancing immediate access with long-term industrial development remains a central policy challenge.

Inclusion and Market Access

Access to e-mobility solutions remains uneven. Women and other underrepresented groups face additional barriers related to finance, ownership, and participation.

Addressing these gaps is important not only from an equity perspective, but also for market expansion. Designing solutions that reflect a wider range of users creates opportunities for both policymakers and private sector actors.

Overall Insight

Africa's e-mobility market is in a transitional phase. It is no longer defined by isolated pilots, but has not yet reached full scale.

Private sector actors are driving this transition through innovation in business models and service delivery. At the same time, the pace of market development is shaped by structural constraints, including affordability, infrastructure, fragmentation, and coordination challenges.

Progress now depends on how effectively these constraints are addressed.

The market is no longer testing what works. It is building the conditions required for scale.

Infrastructure as the Limiting Condition

Infrastructure and energy systems emerged as central determinants of how far and how quickly e-mobility can scale across African markets. Infrastructure has shifted from enabler to bottleneck. The constraint is no longer whether solutions exist, but whether the supporting systems are in place to operate them reliably and at scale.

Infrastructure Gaps and Scaling Constraints

This was reflected in multiple discussions where companies and operators described the difficulty of expanding beyond initial pilots. Charging availability, grid reliability, and broader energy access remain practical barriers to scale.

In commercial segments such as two- and three-wheelers, buses, and logistics fleets, where the economics of electrification are already compelling, infrastructure gaps directly affect utilisation, costs, and service reliability. In several cases, viable business models are unable to scale further because infrastructure has not kept pace.

Adaptive Energy and Charging Models

Energy systems are closely tied to these constraints. Grid capacity and reliability remain uneven across markets, shaping how infrastructure is deployed in practice.

Rather than relying solely on centralised charging networks, a range of adaptive models is emerging. Battery swapping has become prominent in two- and three-wheeler segments. Solar-powered charging and hybrid energy systems are being deployed to manage instability in grid supply.

These approaches are no longer transitional. In many contexts, they are becoming part of long-term system design, particularly where grid upgrades will take time.

Segment-Specific Infrastructure Needs

Infrastructure requirements vary significantly by transport segment. Electric bus systems depend on depot-based charging and require early coordination with grid capacity, route planning, and operational scheduling.

In freight, the focus shifts to corridor-based infrastructure, where charging must align with logistics routes and freight volumes. In smaller vehicle segments, distributed and flexible systems such as battery swapping networks are proving more effective.

Infrastructure cannot be standardised across the sector. It must be developed in ways that reflect how different transport systems operate.

Fragmentation and Interoperability

As the market grows, fragmentation is becoming more visible. In the two- and three-wheeler ecosystem in particular, proprietary battery and charging systems enabled early deployment but are now contributing to duplicated infrastructure and lower utilisation.

There is increasing recognition of the need for alignment. Emerging examples include multi-brand swapping stations and shared battery models. However, interoperability extends beyond technical compatibility. Commercial arrangements, pricing structures, governance models, and data sharing all shape how systems interact. This makes alignment both necessary and complex.

Digital Systems and Data Integration

Digital systems are increasingly embedded within infrastructure operations. Telematics, real-time monitoring, and digital payment platforms are being used to manage charging behaviour, track performance, and improve utilisation.

In commercial mobility, these systems link vehicle use, energy consumption, and repayment models. They enable more efficient route planning and provide financiers with greater visibility on risk. In freight, data on emissions and route usage is informing infrastructure planning and investment decisions.

Lifecycle and Circularity Considerations

Lifecycle considerations are receiving growing attention as markets expand. Discussions on battery end-of-life highlighted both environmental risks and economic opportunities.

Second-life applications, particularly for stationary storage, create potential linkages between mobility and broader energy systems. This extends the role of infrastructure beyond deployment to include how assets are managed, reused, and recycled over time.

Infrastructure Financing and Risk

The relationship between infrastructure and finance is critical. Charging systems, batteries, and associated assets require significant upfront investment, while their viability depends on long-term utilisation.

Different ownership and financing structures are emerging in response, including asset separation and the use of special purpose vehicles. However, infrastructure investment remains sensitive to risk, particularly where utilisation is uncertain or policy frameworks are evolving.

Coordination Across Stakeholders

Infrastructure development depends on coordination across multiple stakeholders. No single actor can develop infrastructure independently.

Governments play a central role in planning, regulation, and de-risking. Private companies contribute operational expertise and innovation. Financiers provide capital but require clarity on risk and returns. In some contexts, collaborative platforms are being used to align demand and improve utilisation across the system.

Policy and Strategic Alignment

Policy and strategy shape how infrastructure systems develop. Inconsistent incentives, fragmented standards, and unclear regulatory frameworks can delay investment and lead to inefficient deployment.

Conversely, coordinated policy direction can accelerate progress. Ethiopia's E-Mobility Strategy provides a clear example, with defined targets for charging infrastructure, grid upgrades, and private sector participation.

Infrastructure and Economic Development

Infrastructure underpins broader economic objectives. Reliable energy systems and charging networks are essential not only for vehicle deployment, but also for local manufacturing, assembly, and value chain development.

Without these foundations, efforts to build domestic industries face higher costs and greater operational risk. Infrastructure therefore acts as a critical enabler of long-term value creation across the sector.

Overall Insight

The focus of the transition is shifting. The question is no longer whether e-mobility can work in African contexts, but how to build the systems that allow it to scale in a stable and efficient way.

Infrastructure and energy systems sit at the centre of this challenge. Progress now depends on how effectively energy supply, charging networks, digital systems, financing structures, and policy frameworks are aligned.

Where this alignment is taking shape, there are already signs of scale. Where it is not, progress remains constrained.

Inclusion (Gender, Youth, Jobs)

Inclusion as a Structural Consideration

Across the sessions, inclusion came through as an important part of the transition, but not one that is unfolding evenly. While e-mobility is already creating economic opportunities, access to these benefits remains shaped by a range of structural factors. These include income levels, access to finance, infrastructure availability, and, in many cases, gender. Several discussions reflected a shared understanding that inclusion does not follow automatically from market growth, and that outcomes depend on how systems and business models are designed. The next phase of the transition will be defined by system integration, not technology deployment.

Affordability and Access to Participation

Affordability is one of the most immediate factors influencing who is able to participate. High upfront vehicle costs continue to limit access, particularly for individual drivers and small operators. In response, a number of companies are structuring financing directly into their models. Pay-as-you-go, lease-to-own, and battery-as-a-service approaches are being used to reduce entry barriers and link payments more closely to income. These models are often supported by digital platforms that track usage and repayment. Across several examples, this has made it possible for drivers without access to traditional credit to enter the market, with repayment performance remaining relatively strong even in informal operating environments.

Income and Livelihood Impacts

There is also evidence that these models are affecting earnings. In commercial segments, particularly in two- and three-wheeler markets, operators reported improvements linked to lower fuel and maintenance costs. In some cases, this translated into more stable incomes. In others, it led to significant increases once repayment cycles were established. These outcomes were not presented as uniform, but they point to a pattern where electrification can improve the economics of livelihoods when supported by appropriate financing structures.

Gender and Participation Gaps

At the same time, participation remains uneven. Women are still underrepresented across much of the e-mobility ecosystem, including in ownership, technical roles, and operations. Discussions highlighted a combination of constraints, including limited access to finance, lower rates of asset ownership, and safety considerations in commercial transport environments. These were described as structural barriers rather than isolated challenges. Several participants noted that without targeted approaches, such as financial products designed with women in mind or improvements in working conditions, these patterns are unlikely to shift on their own.

Infrastructure and Geographic Access

Inclusion is also influenced by how systems are planned and deployed. The location of charging infrastructure, the design of service models, and broader urban planning decisions all affect who is able to access e-mobility solutions. In some cities, infrastructure is concentrated in higher-demand areas, while peri-urban and rural regions remain less served. This reflects differences in energy access, investment patterns, and expected utilisation. As a result, geographic disparities in infrastructure can translate directly into unequal access to both services and economic opportunities.

Digital Access and Participation

Digital systems introduce another layer to this. Many of the models enabling access rely on mobile payments, digital tracking, and platform-based services. While these tools improve efficiency and enable new forms of financing, they also assume a level of digital access and familiarity. Where this is limited, participation may be more difficult, particularly for certain user groups.

Employment and Job Creation

Employment creation featured across several sessions, although the scale and distribution of jobs were linked closely to how quickly the market develops. Opportunities are emerging across a range of activities, including assembly, maintenance, charging operations, logistics, and battery services. In public transport, particularly in electric bus systems, there is potential to create structured employment while improving access to mobility for underserved populations. However, participants also noted that these outcomes depend on sustained investment and coordinated planning, and are not guaranteed in all contexts.

Expanding Economic Participation

Beyond direct employment, the transition is opening up additional areas of economic activity. Discussions on battery lifecycle management pointed to opportunities in repair, refurbishment, recycling, and second-life applications. Similarly, sessions on industrial development and critical minerals highlighted potential roles for local firms in processing, manufacturing, and service provision. These areas were seen as important for expanding participation across the value chain, although several speakers cautioned that without deliberate policy direction, value creation may remain concentrated in a limited number of markets or actors.

Financial and Regulatory Barriers

Financial and regulatory systems also shape who is able to participate. The financing gap facing companies limits the ability of business models that support wider access to scale. Regulatory complexity can have a similar effect, particularly for smaller operators or those transitioning from informal systems. In these cases, requirements that are difficult to meet can act as a barrier to entry rather than a pathway to formalisation.

Overall Insight

Taken together, the discussions suggest that e-mobility in Africa is already generating inclusive outcomes in certain segments, particularly where business models are designed to reduce barriers to entry and improve earnings. At the same time, participation remains uneven, shaped by structural factors that affect access to finance, infrastructure, and employment. Whether the transition leads to broader and more equitable outcomes will depend on how these constraints are addressed through a combination of policy, investment, and continued innovation in business models.

Emerging Areas (Freight, Carbon Markets, Minerals)

Expanding Focus Beyond Early Deployment

Across the sessions, several areas stood out as gaining importance as the e-mobility transition progresses. These include freight electrification, carbon finance, and the development of critical mineral value chains. While each is at a different stage, they were consistently discussed in relation to what comes next, particularly as the focus begins to shift from early deployment toward more complex, system-level expansion.

Freight Electrification and Early Implementation

Freight electrification, in particular, was described as moving beyond initial exploration into early implementation in selected contexts. Examples shared during the programme pointed to progress along defined logistics corridors and in operations where routes and demand are relatively predictable. In these cases, electric trucks were considered technically feasible, with the main challenges linked to commercial viability.

Achieving this depends on several factors coming together, including alignment between routes and charging infrastructure, sufficient utilisation of assets, and access to financing that reflects the capital intensity of freight systems. Several speakers noted that these conditions are difficult to meet in isolation. Projects tend to move forward where there is coordination between shippers, operators, infrastructure providers, and financiers, rather than through standalone efforts.

Carbon Finance: Potential and Constraints

Carbon finance was discussed with a similar level of caution. There is clear interest in its potential to support e-mobility projects, particularly in segments with measurable emissions reductions. At the same time, participants pointed to the practical challenges involved in accessing these mechanisms.

Measurement, reporting, and verification requirements, along with the need to define credible baselines and select appropriate methodologies, were described as both time- and resource-intensive. In a number of cases, this limits participation to projects that are already relatively well structured. For this reason, carbon finance was generally framed as something that can strengthen projects that are already viable, rather than a mechanism that can make unviable projects work.

Battery Lifecycle and Circular Economy

Battery lifecycle management and circular economy activities also featured more prominently than in earlier discussions. As volumes increase, questions around how batteries are managed over time are becoming more immediate. This includes not only disposal, but also opportunities for reuse and repurposing.

Second-life applications, particularly for stationary energy storage, were discussed as a practical way to extend asset value while supporting broader energy needs. Alongside this, there is emerging activity in areas such as repair, refurbishment, and recycling. These were seen not only as environmental requirements, but also as areas where new businesses and jobs are likely to develop. At the same time, the absence of clear standards and regulatory frameworks could create risks as these markets grow.

Critical Minerals and Value Chain Development

Discussions on critical minerals pointed to a different, but closely related, opportunity. With global demand increasing, African countries have the potential to play a larger role in supplying inputs to the e-mobility value chain. However, there was a clear distinction made between extraction and value creation.

Several speakers emphasised that capturing greater economic benefit depends on moving into processing, manufacturing, and related services, rather than remaining focused on raw material exports. Experiences from other regions were referenced to illustrate how this can be achieved, but also to highlight the risks of repeating existing extractive patterns. The outcome, in this case, appears closely tied to policy choices, investment in infrastructure and skills, and the ability to coordinate across markets.

System-Level Dependencies

What links these areas is the extent to which they depend on broader system development. Freight electrification relies on infrastructure and energy systems that are still evolving. Carbon finance depends on data, project structuring, and institutional capacity. Circular economy activities require coordination across markets and alignment on standards. Mineral value chains depend on industrial capacity and access to reliable energy.

In each case, progress appears to be constrained less by technology and more by how these different elements come together.

Policy Direction and Coordination

Policy direction and coordination were recurring factors across all discussions. The balance between imports and local industry, for example, was raised in relation to how countries can support early adoption while also building domestic capability. National strategies, including Ethiopia's approach, were cited as examples of how clear targets and institutional alignment can help to structure emerging markets and attract investment.

There was a consistent emphasis on the role of collaboration between governments, private sector actors, financiers, and development partners in moving from early activity to sustained growth.

Overall Insight

Taken together, these areas point to a broadening of the e-mobility transition. The focus is no longer limited to vehicle adoption, but increasingly includes freight systems, financing mechanisms, industrial development, and resource management. While activity in many of these areas is still at an early stage, there are clear indications that they will shape how the sector develops over time.

The extent to which they contribute to scale and economic value will depend on how effectively they are integrated into the wider system, rather than developed in isolation.

Session Partners

We thank the organisations which partnered with AfEMA and UNEP to support the delivery of thematic sessions during the Forum. These partners contributed expertise, insights, and technical leadership across key discussion areas.

Freight at Scale: Africa's Next E-Mobility Frontier

KÜHNE CLIMATE CENTER

Freight and logistics are emerging as one of the most consequential frontiers in Africa's e-mobility transition. As trade volumes expand across regional corridors and urban delivery systems grow, the sector presents both a major emissions challenge and a high-impact opportunity.

Unlike passenger mobility, freight is driven by strict commercial realities. Electrification will only scale where it delivers on cost, reliability, and operational performance.

While progress is underway, unlocking scale will require coordinated action across infrastructure, finance, policy, and operations.

Key Insights

- **Commercial viability will determine adoption**
  Total cost of ownership (TCO), asset utilisation, and uptime remain the primary decision drivers.
- **Corridor-based electrification is gaining traction**
  Regional logistics routes provide a practical pathway to align demand, infrastructure, and cross-border coordination.
- **Last-mile logistics offers immediate entry points**
  E-cargo bikes and similar solutions are already proving viable in dense urban environments.
- **Data underpins investment**
  Reliable emissions and operational data enable risk assessment, financing structures, and incentive design.
- **Financing remains a core constraint**
  Limited access to affordable capital continues to slow adoption, particularly for smaller operators.
- **System-level coordination is essential**
  Scaling requires alignment across logistics, energy, finance, policy, and technology stakeholders.

Looking Ahead

Freight is moving from a niche consideration to a central pillar of Africa's e-mobility transition. The next phase will depend on translating early pilots into coordinated, scalable systems that align commercial realities with climate objectives.

This insight area was supported through dedicated freight-focused programming at AEW2025, in collaboration with the Kuehne Climate Center.

Alongside discussions on freight and logistics, the Forum also highlighted the growing importance of battery systems and lifecycle management as foundational enablers of Africa's e-mobility transition. As electric mobility scales across the continent — particularly through the import of used vehicles — attention is increasingly turning to how battery flows are managed across their full lifecycle, from first use through to reuse, second-life applications, and end-of-life treatment.

Used EVs and Battery End-of-Life Management

As electric mobility uptake accelerates across Africa particularly through the import of used vehicles managing battery end-of-life (EoL) is emerging as a critical sustainability and governance priority.

At Africa E-Mobility Week 2025, this was explored in a dedicated session on used EVs and battery lifecycle management, bringing together policymakers, technical experts, and industry stakeholders to examine both risks and opportunities associated with battery systems in African markets.

Discussions underscored that without clear standards, traceability, and safe disposal pathways, aging batteries risk creating environmental hazards and undermining public confidence in electric mobility. At the same time, participants highlighted the opportunity to develop circular value chains including EV repair ecosystems, second-life battery applications, and recycling systems aligned with local market conditions.

Experiences shared from Kenya, Ethiopia, and Egypt emphasised the importance of early action including the development of safety protocols, data systems, and institutional capacity to manage battery flows as markets scale.

Key priorities identified included:

- strengthening policy coherence across EV and battery lifecycle management
- establishing extended producer responsibility frameworks
- providing clear guidance on reuse, second-life applications, and recycling
- enabling public–private collaboration and regional coordination

These discussions reinforced that battery lifecycle management must be integrated into e-mobility strategies from the outset — as a core enabler of sustainable and scalable market development.

This thematic focus was supported by partners including ClimateWorks Foundation, contributing to the depth of technical dialogue on battery systems and lifecycle management within the programme.

07 | INDUSTRY TOURS, NETWORKING AND SIDE EVENTS

As part of AEW2025, a series of labs, industry tours, networking events, and closed sessions were convened to deepen technical understanding, strengthen partnerships, and support effective implementation of Africa's e-mobility transition. These engagements complemented the Forum programme by creating dedicated spaces for learning, peer exchange, and relationship-building across policy, industry, finance, and civil society, while reinforcing links between strategy, implementation, and investment.

Two labs were convened as a strategic part of AEW2025, strengthening the technical depth of the programme and equipping participants with tools and perspectives that informed subsequent Forum discussions, industry tours, and bilateral engagements. All participants were registered AEW delegates and engaged across the wider week's activities.

7.1.1 TUMI Futures Literacy Lab | Exploring Mobility Futures in Africa

The TUMI Futures Literacy Lab, the final edition of the 2025 TUMI FLL series, delivered a six-hour participatory foresight experience based on UNESCO's Futures Literacy Lab methodology. Facilitated by Z_Punkt, the session supported participants to move beyond linear planning and explore alternative mobility futures for African cities.

Approximately 40 participants from government, civil society, academia, youth organisations, and the private sector took part. Through scenario building, reflective dialogue, and facilitated exercises, participants examined how assumptions, values, and system dynamics shape mobility outcomes and explored pathways toward more resilient, inclusive, and low-carbon urban systems. Insights from the Lab strengthened participants' contributions to policy, investment, and implementation-focused discussions throughout AEW2025.

7.1.2 Supply-Side Regulation Lab | From Economic Insights to Action

The Supply-Side Regulation (SSR) Lab delivered a focused, two-part technical training designed to support policymakers in implementing Global Memorandum of Understanding (Global MOU)-aligned supply-side regulations. The Lab combined economic modelling, peer learning, and implementation planning, and directly complemented Forum discussions on policy readiness and market creation.

The Lab convened 35 policymakers from 24 African countries, all of whom participated across the wider AEW programme, enabling lessons from the Lab to inform Forum sessions, industry tours, and targeted policy and investment discussions.

Session 1 introduced the Zero-Emission Vehicle Regulatory Savings Estimation Tool (ZEV-RESET), developed by CALSTART, enabling participants to estimate economic, environmental, and health benefits of zero-emission vehicle regulations using country-specific inputs. Session 2 focused on implementation pathways, drawing on global regulatory experience and insights from African frontrunners, with facilitation support from UNEP.

Across the two sessions, participants developed preliminary benefit estimates, clarified implementation considerations, and identified country-specific next steps. Continued technical assistance was made available through the ZEV Rapid Response Facility, D2Z, and DEC Partners.

7.2 Industry Tours

The AEW2025 Industry Tours, sponsored by Chogori Technology Co. Ltd. and delivered in partnership with ITDP and the Ethiopian Ministry of Transport and Logistics (MoTL), provided delegates with first-hand exposure to Ethiopia's emerging e-mobility ecosystem, linking policy ambition with real-world implementation.

More than 100 participants took part, including policymakers, regulators, investors, development partners, founders, and technical practitioners from over 25 countries. Delegates engaged directly with utility engineers, fleet managers, depot operators, manufacturers, innovators, and policymakers, gaining practical insights into charging infrastructure, fleet electrification readiness, vehicle assembly processes, two- and three-wheeler innovation, and multimodal integration across urban transport systems. These experiences directly informed subsequent Forum sessions, bilateral discussions, and investment-oriented conversations.

Route 1 – Charging, Fleet and Manufacturing

- Anbessa Garage (high-capacity charging infrastructure)
- Megenagna Bus Depot (electrification readiness)
- Marathon Motors (Hyundai EV assembly)
- Belayneh Kinde Group (electric minibus assembly)

Route 2 – Two-Wheelers and Multimodal Systems

- Dodai (battery swapping and test rides)
- Shegole Bus Depot (electrification readiness)
- Marathon Motors (EV assembly)
- Addis Ababa Light Rail (EV operations and integration)

The tours reinforced the importance of coordinated planning across energy, transport, and industrial systems, while highlighting Ethiopia's progress in translating national policy into operational e-mobility solutions. Insights strengthened the practical grounding of AEW2025 discussions on infrastructure readiness, manufacturing potential, and system integration.

7.3 Women Driving Change | Networking Event

As part of AEW2025's commitment to inclusion and gender-responsive mobility systems, a dedicated networking event titled "Women Driving Change: An Evening of Connection and Inspiration" was convened on 15 October 2025 at the UN Economic Commission for Africa Conference Centre. The event was hosted by UNEP Kenya in collaboration with GIZ Kenya and WomenMobilizeWomen.

The session brought together women professionals from across the continent working in policy, clean technology, entrepreneurship, manufacturing, and mobility infrastructure. Participants also engaged across the wider AEW programme, enabling connections formed during the event to carry through into policy, finance, and partnership discussions during the week.

Designed as a networking and leadership dialogue, the event highlighted e-mobility as both a decarbonisation pathway and a catalyst for inclusion, leadership, and economic opportunity. Discussions focused on professional networking, leadership journeys, skills development, and addressing structural barriers faced by women across the mobility value chain.

Programme highlights included opening remarks by UNEP on inclusive policy and participation, followed by short impulse speeches from women leaders across the sector. Speakers reflected on allyship, leadership representation, scaling electric mobility solutions, and improving access for marginalised communities, including persons with disabilities. The session reinforced the importance of strengthening women's participation and leadership within AEW and future Forum editions.

7.4 Invitation-Only Workshops and Networking Receptions

In addition to the Forum programme, AEW2025 hosted a number of invitation-only workshops and curated networking events designed to deepen technical exchange, facilitate peer learning, and strengthen partnerships across the e-mobility ecosystem. These sessions complemented the public programme by providing focused, interactive environments for stakeholders working at the intersection of policy, finance, and implementation.

7.4.1 From Concepts to Credits: Navigating Carbon Finance for African Transport Projects

As part of the AEW2025 pre-event programme, South Pole convened a closed-door workshop titled “From Concepts to Credits: Navigating Carbon Finance for African Transport Projects.” The session provided practical, experience-based insights into applying carbon markets within African transport projects, with a particular focus on electric mobility.

The interactive workshop convened approximately 30 participants, including government representatives, project implementers, carbon market specialists, and financiers. The session prioritised practical learning, drawing on real-world case studies and peer exchange to explore technical, regulatory, and financial dimensions of transport-related carbon projects.

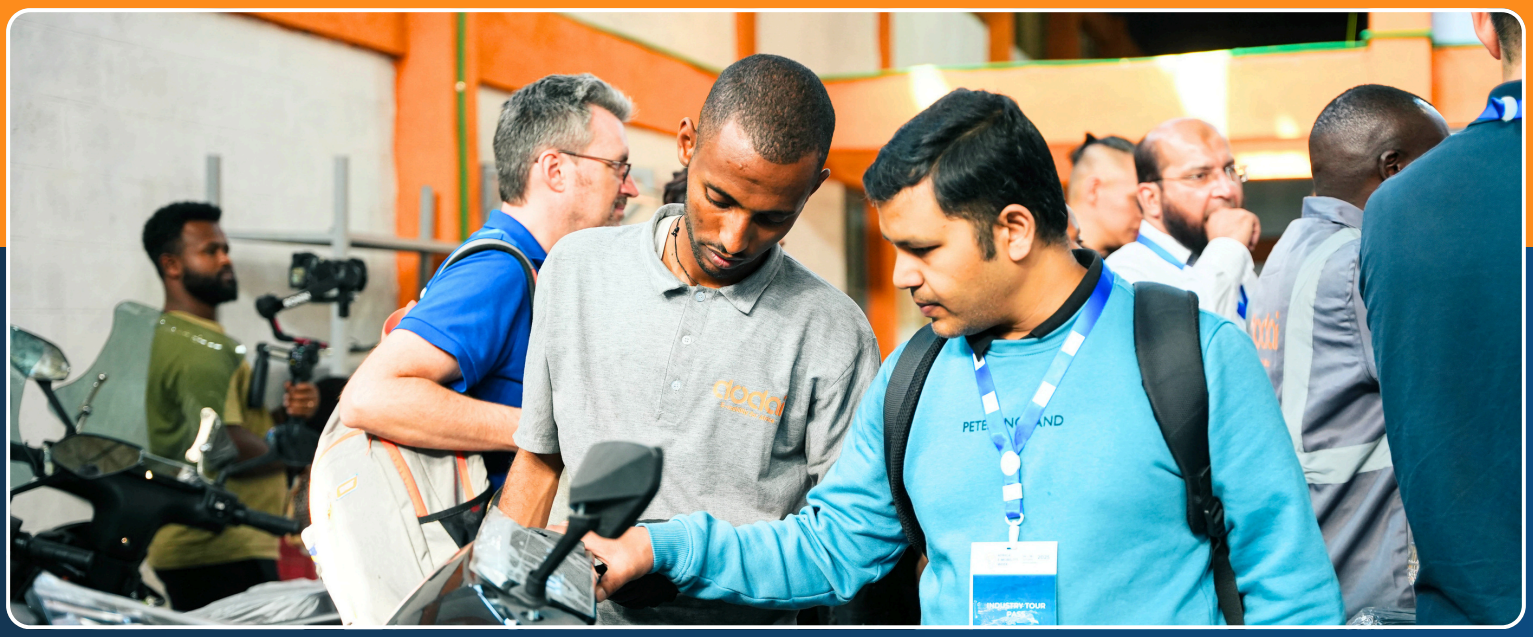
The programme included a focused training segment led by South Pole, followed by breakout discussions and an open Q&A. Discussions covered project development challenges, methodologies and verification, buyer and offtaker expectations, policy alignment, and pathways to mobilising finance. Participants clarified project- and country-specific next steps and accessed continued technical engagement through South Pole’s support pathways.

7.4.2 AEW2025 Networking Reception

On 16 October 2025, an evening networking reception was held at the Grand Louvre Hotel in Addis Ababa. Co-hosted by Auto24 and MobilityX Africa, the reception provided a relaxed yet purposeful setting for delegates to connect outside the formal conference environment.

The curated event brought together more than 50 participants, including e-mobility founders, entrepreneurs, investors, development finance institutions, government officials, and ecosystem partners. Designed to prioritise depth over scale, the reception facilitated relationship-building, partnership exploration, and early-stage deal-making conversations.

The programme included brief welcome remarks, short lightning insights from selected funding organisations on their e-mobility investment focus, and open networking. By creating space for informal exchange between innovators, financiers, and policymakers, the reception reinforced AEW2025's role as a convening platform supporting collaboration and investment across Africa's electric mobility ecosystem.



08 TECHNOLOGY EXHIBITION AND INNOVATION SHOWCASES

The AEW2025 Technology Exhibition and Innovation Showcases took place on 15–16 October 2025 at the UNECA Conference Centre. Positioned as a core programme component, the exhibition functioned as a structured engagement platform linking market-ready electric mobility solutions with policymakers, financiers, development partners, and technical practitioners convened during AEW2025. In doing so, it positioned innovation within an investable and policy-relevant framework.

The exhibition convened over 20 exhibiting organisations spanning key segments of Africa's electric mobility value chain. These included electric two- and three-wheelers, passenger and commercial vehicle manufacturers, charging and energy solution providers, fleet and digital platform operators, component suppliers, public institutions, and ecosystem enablers. Participation was anchored in Ethiopia and Kenya, with additional representation from West Africa and international technology providers, including companies headquartered in China.

Participating organisations represented varying stages of market maturity, ranging from locally assembled electric minibuses and motorcycles to advanced charging hardware, software platforms, and integrated energy systems supporting scaled deployment. This breadth enabled delegates to compare business models, localisation pathways, financing structures, and operational readiness across diverse African market contexts.

A defining feature of the exhibition was the integration of vehicles from the Road to Addis Africa electric convoy into the expo display. This provided a direct link between corridor-level demonstration and real-world deployment, grounding policy and investment discussions in tested operational experience. The presence of convoy vehicles signalled deployment readiness and reinforced the practical viability of electric mobility solutions showcased during AEW2025.

The exhibition was embedded within the Forum programme, enabling sustained interaction between exhibitors and registered AEW2025 delegates across both days. Policymakers, investors, development partners, entrepreneurs, and technical practitioners engaged directly with solution providers through demonstrations, product walkthroughs, and focused bilateral discussions. These exchanges examined deployment pathways, financing requirements, infrastructure readiness, and operational considerations across diverse market contexts, reinforcing the Expo's role as an interface between strategic priorities and market execution.

While the expo was not structured around formal product launches in 2025, exhibitor and partner feedback has informed plans to introduce designated announcement segments in future editions, providing structured opportunities for governments, private sector actors, and ecosystem partners to share market developments. In 2025, the exhibition's primary contribution was to present a consolidated, real-time snapshot of Africa's evolving electric mobility landscape. Positioned alongside Forum sessions, accelerator activities, and industry tours, yet maintained as a distinct programme element, the Technology Exhibition advanced coherence between policy direction, capital mobilisation, and operational delivery pathways.

A. Exhibitor Descriptions

Electric Vehicle Manufacturing & Assembly

Organisation	Segment	Country / Region	Description
Atlantic Meridian EV	EV development & commercial vehicle solutions	Ghana	Electric vehicle developer focused on commercial fleet electrification.
Belayneh Kinde Group (BKG)	EV manufacturing & assembly (minibuses)	Ethiopia	Ethiopian manufacturer assembling locally produced electric minibuses for urban transport.
Zeta Motors Group	EV manufacturing & assembly	Ethiopia	Ethiopian electric vehicle manufacturer focused on local assembly and market deployment.
Roam Electric	Electric motorcycles & buses	Kenya	Manufacturer of electric motorcycles and buses designed for African operating conditions.
Spiro	Electric motorcycle manufacturing & swapping	Multi-country Africa	Manufacturer and operator of electric motorcycles and battery swapping networks.

Commercial & Fleet Vehicle Providers

Organisation	Segment	Country / Region	Description
Kabisa	Electric SUVs, trucks, buses & vans	Rwanda / East Africa	Distributor and integrator of electric SUVs, trucks, buses, and commercial vehicles.
GoCab	Electric taxi & ride-hailing	Côte d'Ivoire	Electric taxi platform providing zero-emission urban transport services.

Charging Infrastructure & Power Electronics

Organisation	Segment	Country / Region	Description
Chogori Technology Co. Ltd	Charging infrastructure & power electronics	China (Africa-facing)	Manufacturer of EV chargers and power electronics serving African and global markets.
INFYPOWER	Charging hardware & power electronics	China	Global manufacturer of EV charging systems and power conversion technologies.

Digital, Fleet & Battery Software Platforms

Organisation	Segment	Country / Region	Description
illigo	EV fleet & charging software	Nigeria	Software platform supporting EV fleet management and charging optimisation.
Munja Energy	Battery analytics & energy software	Kenya	Software company providing battery analytics and energy performance optimisation tools.
TELTONIKA	IoT, telematics & connectivity solutions	Kenya	Provider of IoT devices and telematics solutions for mobility and energy applications.
Auto24 Africa	EV retail & digital marketplace	Multi-country Africa	Digital marketplace for vehicle sales, financing, and cross-border automotive trade.

Energy, Grid & Storage Solutions

Organisation	Segment	Country / Region	Description
Kenya Power (KPLC)	Power utility & grid infrastructure	Kenya	National electricity utility responsible for power distribution and grid operations.
Omnivoltaic	Energy storage & solar integration	International	Provider of modular energy storage and solar integration solutions.

Automotive Distribution & Services

Organisation	Segment	Country / Region	Description
Moenco Ethiopia	Automotive distribution & services	Ethiopia	Automotive distributor providing vehicle sales, servicing, and fleet support services.

Public Sector & Trade Facilitation

Organisation	Segment	Country / Region	Description
Ministry of Transport and Logistics (MoTL)	Public sector / transport policy	Ethiopia	Government authority responsible for national transport and logistics policy.
KOTRA Addis Ababa	Trade & investment facilitation	Ethiopia / Republic of Korea	Trade promotion agency supporting Korean–African investment and industrial partnerships.

Ecosystem Convening & Communications

Organisation	Segment	Country / Region	Description
Intro Africa	Media & ecosystem communications	Africa-wide	Media platform covering African innovation, investment, and entrepreneurship ecosystems.
Africa E-Mobility Alliance (AfEMA)	Ecosystem convening & policy advocacy	Pan-African	Pan-African think tank convening stakeholders to advance electric mobility adoption.

09 | OUTCOMES AND IMPACT SUMMARY

Policy, Finance, and Market Signals

Africa's e-mobility sector is entering a more structured phase of development. Deployment is increasing across segments, while attention is shifting to the conditions required for scale. The next phase will be measured by delivery.

The primary constraint is no longer technology. Progress is shaped by how effectively policy, finance, and infrastructure are deployed and aligned. The focus has shifted to implementation. Policy engagement is increasing, with several markets advancing national strategies and regulatory frameworks. Implementation remains uneven. Institutional coordination, regulatory clarity, and fiscal design continue to determine market outcomes.

Adoption is most visible in high-utilisation segments, including two- and three-wheelers and fleet operations. Uptake is driven by cost and operational efficiency. Private vehicle adoption remains constrained by affordability.

Infrastructure and energy systems continue to define the pace of expansion. Charging availability, grid reliability, and energy access determine where deployment can occur and be sustained. In several markets, vehicle uptake is advancing faster than supporting infrastructure.

Finance remains central. Capital is present, but access is uneven and costly. High upfront costs, evolving business models, and fragmented markets require financing structures aligned with operating realities. The gap between early-stage funding and scale capital persists. Progress will depend on coordinated development across policy, finance, infrastructure, and market systems.

Partnerships and Commitments

Engagement across the Forum reflects a shift toward implementation-focused collaboration.

Partnerships highlighted during the programme were linked to specific areas of deployment, including fleet operations, charging infrastructure, and financing models. These collaborations are increasingly focused on addressing operational constraints.

Coordination across stakeholders is becoming more structured. Private sector actors, public institutions, financiers, and development partners are engaging in more integrated ways, particularly in public transport and logistics.

The Forum enabled alignment across markets and institutions. It strengthened connections between policy, industry, and finance, and helped identify opportunities for collaboration and regional harmonisation.

AEW continues to serve as a convening platform in this context, supporting sustained engagement across stakeholders.

Overall Insight

The outcomes of AEW2025 indicate that the sector is in a transitional phase. Activity is expanding beyond pilots, while the systems required for scale are still developing.

Policy development is advancing, but implementation remains uneven. Technology adoption is concentrated in commercial segments where economic value is clear. Infrastructure and energy systems continue to shape the pace of expansion, while financing structures determine the ability to scale. Partnerships are becoming more structured, though further alignment is required.

Progress now depends on how effectively these elements are implemented in practice. This includes strengthening policy execution, advancing financing mechanisms, expanding infrastructure, and improving coordination across the ecosystem. It also requires closer alignment with energy sector actors, particularly utilities, to ensure that transport electrification is supported by clean and reliable power systems.

AEW2025 reflects a stage where the focus has shifted decisively toward implementation.

10 | LOOKING AHEAD

Implications for AEW and the Forum 2026

The discussions outlined above point to a shift in what is required from convening platforms such as AEW.

As the sector moves further into implementation, the value of AEW will be defined by its ability to structure engagement around delivery. This depends on how effectively it connects policy direction, industry activity, and capital in practical ways.

Three priorities emerge.

- The first is a shift from dialogue to delivery. Stakeholders are seeking more outcome-oriented engagement, with greater focus on project development, financing approaches, and models that can be replicated across markets.
- The second is ecosystem coordination. Engagement is becoming more structured, but alignment across public institutions, industry, and capital remains incomplete. AEW can support more deliberate coordination around shared priorities.
- The third is the development of investment-ready pipelines. Interest is increasing in opportunities that are structured and de-risked, particularly across two- and three-wheelers, charging infrastructure, and fleet electrification.

Early Signals and Areas for Deepening Collaboration

Several areas stand out for further collaboration ahead of 2026.

Continued progress will depend on translating policy direction into consistent and predictable operating environments. This will require closer engagement between national and local governments and industry.

Local ecosystem development will be central to sustaining growth. Expansion of assembly, servicing, and skills systems is particularly important in markets where adoption is accelerating.

Data and evidence will play a larger role in decision-making. More consistent and shared data, including on total cost of ownership and operational performance, will be needed to support both policy and investment decisions.

Structured regional knowledge exchange can accelerate progress by enabling markets to adapt lessons from leading contexts.

11 PARTNER AND SPONSOR ACKNOWLEDGEMENTS

AEW2025 was delivered through close collaboration with a range of strategic, institutional, and ecosystem partners whose contributions were central to the success of the programme.

We extend our sincere appreciation to the MoTL for its leadership and partnership in hosting AEW2025. As the primary government counterpart, the Ministry enabled high-level participation and anchored the programme within Ethiopia's national policy agenda, including the launch of the Ethiopian E-Mobility Strategy and Implementation Plan (2025–2030).

We thank UNEP for its leadership of the Forum as a global platform for policy dialogue on sustainable mobility. In 2025, AfEMA worked in close partnership with UNEP as co-convenor of the Forum, contributing to the design and delivery of the programme. This collaboration ensured alignment with global e-mobility priorities while maintaining a strong focus on African market contexts and implementation pathways.

At the continental level, we acknowledge the engagement of the AUC and the UNECA. Their participation reflected alignment with broader transport, energy, and regional integration agendas, and reinforced the importance of coordinated approaches to scaling e-mobility across the continent.

Strategic partners, including CPCS and MobilityX Africa, contributed to key programme components focused on market development, investment, and entrepreneurship. CPCS provided technical and advisory expertise across transport, infrastructure, and energy systems, strengthening the overall depth and structure of the programme. MobilityX Africa played a central role in curating the Accelerator Stage, strengthening investor–entrepreneur engagement and supporting the visibility of emerging African e-mobility ventures.

We also recognise the contribution of Agora Verkehrswende, which supported the programme through expert facilitation, including moderation within the Collaboration Stage, contributing to structured dialogue on policy, coordination, and ecosystem development.

Technical perspectives were further strengthened through partners such as ITDP Africa, whose contributions to discussions on public transport electrification and bus rapid transit systems supported more applied, system-level engagement.

We also acknowledge the broader network of development partners, private sector actors, and ecosystem stakeholders who contributed across AEW2025, including within the Forum, Solutions, Accelerator, and Collaboration stages.

Finally, we extend our appreciation to all speakers, moderators, and participants whose engagement made AEW2025 a meaningful platform for dialogue, knowledge exchange, and collaboration.

Collectively, these partnerships reinforced AEW's role as a platform for coordination across national, regional, and global stakeholders, supporting the transition from policy ambition to implementation across Africa's e-mobility ecosystem.

Forum Co-conveners

UN environment programme

E-MOBILITY ALLIANCE

Host Government

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