EXECUTIVE BRIEF

EAST AFRICA'S ELECTRIC-MOBILITY ECOSYSTEM

WHERE SCALE IS EMERGING

- and where value is still leaking.

CORE SCOPE

KENYA | UGANDA | RWANDA | TANZANIA

Public intelligence brief | Data cut-off: 6 August 2026

RAFFINÉ INTELLIGENCE STUDIO

Market Entry | Partner Intelligence | Decision Support

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HOW TO READ THIS INTELLIGENCE BRIEF

A DECISION SCAN - NOT A MARKET-SIZE FORECAST.

01

PURPOSE

Identify where commercial momentum is visible, where execution is fragile and what a market entrant should verify before committing capital.

02

SCOPE

Kenya, Uganda, Rwanda and Tanzania are the core markets. Ethiopia and the wider region are relevant, but outside this brief's evidence boundary.

03

EVIDENCE

Priority is given to regulators, ministries, the IEA, World Bank and UNEP. Industry data and company milestones are used with clear attribution.

04

LANGUAGE

Verified signals are separated from Raffiné interpretation and from questions that still require field or company-level investigation.

EVIDENCE BOUNDARY

This public brief uses desk research available by 6 August 2026. It does not include private operator data, paid client work or new field verification. Vehicle counts from different sources are not treated as directly comparable.

EXECUTIVE VERDICT

THE MARKET IS REAL. THE SHORTCUTS ARE NOT.

RAFFINÉ INSIGHT

East Africa's EV opportunity is a system-integration problem disguised as a vehicle market.

- High-utilisation motorcycles, buses and fleet vehicles are creating the clearest near-term economics. Private cars matter, but they are not the only - or necessarily the first - scale engine.
- East Africa is not one market. Policy, power economics, transport patterns, finance and operating density differ materially by country and city.
- The durable moat is unlikely to be the vehicle alone. Finance, energy access, uptime, parts, battery data and customer support determine whether the vehicle earns.
- The most dangerous assumption is that ambitious policy targets or announced deployments automatically equal bankable demand.

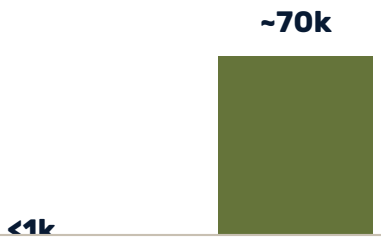
ENTRY THESIS

Enter around a proven use case, anchor fleet or operating corridor. Do not launch regionally and hope infrastructure, financing and service capability catch up later.

OBSERVABLE MARKET SIGNALS

MOMENTUM IS VISIBLE - BUT THE DATA STILL NEEDS DISCIPLINE.

AFRICA ELECTRIC TWO-WHEELER SALES



25,000+

Electric two-wheelers sold in Kenya in 2025; about 15% of new two-wheeler registrations. [S1]

8.43 GWh

Kenya e-mobility electricity consumption in 2025, up 188% from 2024. [S2]

35,000+

EVs registered in Kenya by end-2025, mostly two-wheelers, according to EMAK data cited by Kenya Power. [S3]

98 of 208

Active African e-mobility companies were mapped to East Africa by AfEMA in 2025. This indicates ecosystem density, not company quality or survival. [S4]

DATA RULE: sales, registrations, estimated fleets, vehicles in operation and charging customers are different measures. Combining them would create false precision.

UTILISATION - NOT NOVELTY - IS THE ADOPTION ENGINE.

01

Commercial two-wheelers

High daily kilometres, fuel sensitivity and income-linked use make the economics visible. Swapping can protect uptime, but only when network density and battery availability are reliable.

CLEAREST NEAR-TERM SIGNAL

02

Buses and controlled fleets

Fixed routes and depots make charging more manageable. BasiGo reported 100 buses deployed across Kenya and Rwanda in 2025; its bundled model illustrates how finance, service and charging can move together. [S6]

BANKABLE WITH ROUTE CONTROL

03

Private passenger cars

Affordable imports can accelerate demand, but public charging coverage, home parking, credit, resale value, parts and battery assurance remain uneven. The opportunity is real, but market depth must be proven city by city.

SELECTIVE - NOT MASS-MARKET BY DEFAULT

High-use segments also lead the World Bank's developing-market case. [S5]

KENYA AND UGANDA ARE NOT THE SAME ENTRY CASE.

KENYA

Strongest observable scale signal

SIGNAL

The final National Electric Mobility Policy was launched in February 2026. Kenya also has a dedicated e-mobility tariff and charging / swapping guidelines.

OPPORTUNITY

Electric motorcycles, buses, vans, asset finance, after-sales and energy infrastructure around proven demand nodes.

DILIGENCE RISK

Economics outside major cities; default, residual-value and network-utilisation evidence; parts depth.

Sources: [S1] [S7] [S8] [S9]

UGANDA

Policy ambition ahead of market proof

SIGNAL

The National E-Mobility Strategy targets full transition of public transport and motorcycles by 2030, and passenger vehicle sales by 2040.

OPPORTUNITY

Commercial motorcycles, buses, local assembly, charging / swapping and service models in Kampala and selected secondary-city corridors.

DILIGENCE RISK

Verify implementation sequence, financing, site power and after-sales. A policy target is not bankable demand.

Source: [S10]

RWANDA AND TANZANIA REWARD DIFFERENT STRATEGIES.

RWANDA

Policy-coherent, compact and smaller

SIGNAL

Rwanda extended zero import duty for electric and hybrid vehicles and electric motorcycles in 2024/25. Locally assembled EVs, relevant batteries and charging equipment are zero-rated for VAT under 2025 guidance.

OPPORTUNITY

A focused testbed for motorcycle energy networks, e-buses, fleet services, charging and business models that can later expand regionally.

DILIGENCE RISK

Market size, electricity cost and annual incentive review. Policy coherence does not equal unlimited depth.

Sources: [S11] [S12] [S13]

TANZANIA

A large 2/3W base with formalisation emerging

SIGNAL

The Ministry of Energy estimated more than 10,000 EVs in 2026, largely two- and three-wheelers. New EWURA guidelines cover charging, swapping, safety, data and interoperability.

OPPORTUNITY

Commercial three-wheelers, urban route fleets, charging / swapping operations, safety compliance, data services and corridor development.

DILIGENCE RISK

Clarify fleet count, battery chemistry and infrastructure. Official estimates require independent reconciliation.

Sources: [S14] [S15]

DO NOT COUNT CHARGERS. MODEL UPTIME.

SWAP

SWAP | Motorcycle networks

Fast energy access can protect rider income, but each station carries battery inventory, charging capacity and service obligations.

TEST: swaps per station, charged-battery availability, failure rate, working capital

DEPOT

DEPOT | Buses and fleets

Fixed routes and overnight windows improve control. The constraint shifts to grid connection, transformer capacity, spare vehicles and schedule discipline.

TEST: route km, dwell time, peak load, charger redundancy, fleet uptime

AC

AC | Homes and workplaces

Distributed charging can be cheaper than public fast charging, but depends on parking rights, electrical safety and reliable site access.

TEST: parking, metering, voltage, ownership, installation compliance

DC

DC | Corridors and public hubs

High-power stations need visible demand. A location can be strategically attractive and still be commercially underutilised.

TEST: daily sessions, kWh sold, grid upgrades, uptime, payment and security

Kenya's tariff creates an off-peak charging signal at KSh 8/kWh versus KSh 16 at peak. Tanzania's 2026 spacing guidance is a planning standard - not evidence that a nationwide network already exists. [S9] [S14]

CLOSED SYSTEMS CAN SOLVE EARLY RISK - AND CREATE LATER FRICTION.

WHY CLOSED SYSTEMS WIN EARLY

- Control battery safety, vehicle fit and warranty.
- Coordinate hardware, software and service.
- Protect infrastructure capital and customer experience.
- Generate consistent operating data for finance.

WHERE FRICTION APPEARS LATER

- Rider and vehicle lock-in across sparse networks.
- Duplicate stations, batteries and spare inventories.
- Lower residual confidence for lenders and insurers.
- Slower cross-brand and cross-city expansion.

RAFFINÉ POSITION

Standardise safety, data, testing and interface rules first. Do not assume one universal battery design must be imposed before the technology and use cases mature.

EVIDENCE OF DIRECTION

Ampersand has opened its swap network to a third-party motorcycle manufacturer. Tanzania's 2026 rules require interoperability within swapping networks and cross-network identification for public charging. These are signals of movement - not proof of regional convergence. [S14] [S17]

VALUE IS CREATED ACROSS THE SYSTEM - AND LEAKS AT THE INTERFACES.

01

Vehicle and battery supply

VALUE fit-for-use design, assembly, warranty

LEAK import mismatch, weak spares, poor durability

02

Finance and asset ownership

VALUE productive asset repays through use

LEAK defaults, FX exposure, unknown residual value

03

Energy and network operations

VALUE recurring energy revenue and uptime

LEAK underused sites, excess battery working capital

04

Operations and after-sales

VALUE availability, trust and longer asset life

LEAK downtime, technician gaps, imported parts delay

05

Data and end-of-life

VALUE battery health, second life, recycling

LEAK unclear liability, weak records, stranded packs

THE MOST ATTRACTIVE GAPS ARE NOT ALL VEHICLE SALES.

01 Asset finance + residual data

Local-currency products, battery valuation, insurance and collections can unlock demand - if default, repossession and resale assumptions are real.

02 Shared after-sales capability

Diagnostics, technician training, parts inventory and multi-brand service can protect uptime where each OEM cannot justify a full network.

03 Depot and swap-site delivery

Site sourcing, grid connection, energy management and operations matter more than charger hardware alone.

04 Battery intelligence + recovery

State-of-health records, warranties, second-life routing and compliant disposal can reduce lender and operator uncertainty.

05 Interoperability + payments

Certification, roaming, clearing, APIs and neutral data layers may connect networks without forcing one premature universal battery.

06 Secondary-city route intelligence

Demand mapping can identify where high utilisation exists before companies replicate Nairobi or Kigali assumptions elsewhere.

Finance is a central constraint in UNEP's 2026 assessment; AfDB's GMFA is designed to use blended finance and credit enhancement to mobilise investment. [S16] [S18]

MARKET-ENTRY TEST

A DISTRIBUTOR IS ONE DEPENDENCY - NOT THE ENTRY STRATEGY.

01 **Which customer and use case generate the required daily kilometres?**

02 **Do savings survive finance cost, energy, downtime, taxes and residual risk?**

03 **Is there anchor demand, or is the launch dependent on scattered retail buyers?**

04 **Who owns the battery - and who pays when performance degrades?**

05 **Can energy be delivered reliably at the depot, station or rider route?**

06 **Who stocks parts, diagnoses faults and restores the asset to service?**

07 **Which import, licensing, safety, data and environmental rules apply?**

08 **What evidence would justify delaying, redesigning or walking away?**

The decision is not: Can we sell an EV?
It is: Can the operating system earn reliably?

PROCEED SELECTIVELY - NOT REGIONALLY BY DEFAULT.

PROCEED WHEN

- High utilisation and anchor demand are observable.
- Energy access is controlled at the required density.
- Customer savings remain after finance and downtime.
- Local service, parts and battery responsibility are funded.
- The model survives without temporary incentives.

REDESIGN OR AVOID WHEN

- The plan assumes East Africa is one homogeneous market.
- A dealer relationship substitutes for operating capability.
- Chargers are deployed before vehicle demand is visible.
- Battery replacement and end-of-life liability are unclear.
- The economics require unverified savings or policy promises.

WHAT WOULD CHANGE THIS THESIS

- Reliable local-currency debt, insurance and residual-value models become widely available.
- Operator data proves low default, durable batteries and high station utilisation across cities.
- Standards and commercial agreements enable practical roaming or cross-brand energy access.
- Affordable passenger EV imports, home charging and used-vehicle assurance deepen private demand.
- Policy incentives are withdrawn, delayed or replaced by stricter local-content rules.

QUESTIONS WE ARE STILL INVESTIGATING

THE NEXT ADVANTAGE WILL COME FROM BETTER EVIDENCE.

Q01	Do rider savings survive lease payments, swap tariffs, downtime and seasonal demand?
Q02	Which swap and charging sites reach positive utilisation - and how long does that take?
Q03	Will lenders and insurers receive credible battery state-of-health and residual-value data?
Q04	Who carries warranty, recycling and disposal liability when a battery changes hands?
Q05	Can regional safety and data standards converge before incompatible systems become entrenched?
Q06	Which secondary cities have enough route density to support infrastructure without subsidy?
Q07	What payment-security and fare structures make electric bus contracts bankable?

CLOSING OBSERVATION

The winner will not be the company with the strongest announcement. It will be the system that keeps productive vehicles earning.

PRIMARY AND INSTITUTIONAL EVIDENCE USED.

S1 **IEA - Global EV Outlook 2026: Trends in other EV modes**
www.iea.org

S2 **Kenya Power - Electric vehicle charging drives rise in electricity consumption in 2025**
newsroom.kplc.co.ke

S3 **Kenya Power - Kenya had over 35,000 registered EVs by end-2025, mostly two-wheelers**
www.newsroom.kplc.co.ke

S4 **Africa E-Mobility Alliance - Africa E-Mobility Report 2025**
africaema.org

S5 **World Bank - Electric Mobility in Developing Countries: Cost Benefit Analysis and Policy Guidance**
www.worldbank.org

S6 **BasiGo - 100th electric bus deployed across Kenya and Rwanda (operator-reported)**
www.basi-go.com

S7 **Kenya Ministry of Roads and Transport - National Electric Mobility Policy**
www.transport.go.ke

S8 **Kenya EPRA - Electric vehicle charging and battery swapping infrastructure guidelines**
epra.go.ke

S9 **Kenya Power - E-mobility tariff: KSh 16 peak and KSh 8 off-peak per kWh**
newsroom.kplc.co.ke

THE EVIDENCE BASE AND ITS LIMITS.

S10 **Uganda STI Secretariat - National E-Mobility Strategy**
sti.go.ug

S11 **Rwanda Revenue Authority - Electric and hybrid vehicle incentives, 2024/25**
www.rra.gov.rw

S12 **Rwanda Revenue Authority - VAT information, 2025**
www.rra.gov.rw

S13 **Rwanda MININFRA - Electric Vehicle Charging Infrastructure Master Plan**
www.mininfra.gov.rw

S14 **Tanzania EWURA - E-mobility charging and battery swapping guidelines, effective April 2026**
www.ewura.go.tz

S15 **Tanzania Ministry of Energy - E-mobility adoption and estimated vehicle base, 2026**
www.nishati.go.tz

S16 **UNEP - Capital 2 Mobilize: Financing the electric two- and three-wheeler transition**
www.unep.org

S17 **Ampersand - Battery swap network opened to third-party vehicle manufacturers (operator-reported)**
www.ampersand.energy

S18 **African Development Bank - Green Mobility Financing Facility for Africa, 2026**
www.afdb.org

METHOD NOTE

Company claims are labelled as operator-reported. Public counts were not merged when definitions or dates differed. Conclusions are analytical inferences from the cited evidence, not guarantees of market performance.

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