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Africa Electric Two-Wheeler Market Assessment, By Vehicle Type [Motorcycle, Scooter/Mopeds], By Battery Type [Lead Acid, Lithium-Ion, NiMH], By Battery Voltage [Upto 24V, 25V-60V, 60V and Above], By Application [Commercial, Personal], By Distribution Channel [Online; Offline-Original Equipment Manufacturers (OEMs), Distributors, Retailers], By Country, Opportunities, and Forecast, 2018-2032F

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Abstracts

Africa electric two-wheeler market is projected to witness a strong CAGR of 24.78% during the forecast period 2025-2032, growing from USD 554.68 million in 2024 to USD 3259.86 million in 2032. The market has experienced significant growth in recent years and is expected to maintain a strong pace of expansion in the coming years.

Internal Combustion Engines (ICE) are increasingly being replaced with electric vehicles (EVs) because of higher fuel prices and rising vehicular pollution. Electric motorcycles and e-scooters are gaining popularity throughout the region because they are portable, simple to use, and help achieve the objective of zero carbon emissions. Additionally, Egypt and Morocco are popular travel destinations for tourists from abroad. The demand is being driven by the tourists who choose to rent e-scooters for local transportation and adventure. African tourism came back on its pre-covid trajectory and is anticipated to impact the sales of sustainable mobility due to the government’s focus on sustainability and efficiency.

The international promotion of electric two-wheelers has also positively impacted the

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adoption of electric two-wheelers. The major electric two-wheeler manufacturers across the globe, especially Indian and Chinese companies with affordable alternatives are entering the African market. These companies are also investing in the region for the expansion of distribution and manufacturing facilities. The crucial role of these companies is to accelerate the sales of electric two-wheelers and build infrastructure and employment opportunities for the natives.

For instance: in August 2023, Indian company One Electric Motorcycles announced that they have begun to produce their flagship electric motorcycle “KRIDN” in Africa. They have entered a joint venture (JV) with a local well-established vehicle manufacturing entity and have provided all the necessary parts, technology, and knowledge to assemble their motorcycles. They also plan to set up a battery production plant in Africa.

Urban Mobility and International Collaborations to Influence Demand for Electric Motorcycles

Few countries in Africa have a higher rate of urbanization than other developing nations. The rapid migration of the rural population into urban areas is putting pressure on the transport infrastructure and energy requirements. Since most public transport works on fuel, there is a gasoline shortage with increased fuel prices. Using ICE two-wheelers contributes to issues including fuel scarcity, high fuel costs, and rising pollution. Africa, therefore, requires alternate transportation that decreases reliance on gasoline. Hence, the use of electric two-wheelers with lower emissions and harmful pollutants in the air, is becoming increasingly popular. The local companies also collaborate with international EV giants to develop technologies for enhanced electric motorcycles with higher efficiency.

For instance, in October 2023, Kofa, Ghana’s leading battery network solutions provider, teamed up with China’s top electric vehicle brand, TAILG Group. The partnership is to launch a new electric motorcycle, the Jidi. The Jidi is equipped with Kofa’s cutting-edge battery swap technology, making it the first of its kind in the country. The company’s mission is to build an inclusive, cost-effective, and customer-focused electricity network that is powered by portable battery technology and renewable energy sources. The company’s Kofa swap-and-go system is a fully distributed battery and swap station network that allows users to access a fully charged battery in a matter of seconds.

Expanding Tourism, Rapid Urbanization, and Attracts Adoption of Electric Scooters in

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Africa

The increasing growth of tourism in African cities such as Cape Town is leading to the rapid adoption of electric two-wheelers as tourists look for cost-effective and comfortable transportation options. Electric scooter renting company Lime introduced a mobile app to serve tourists that positively impacted their business growth and raised the demand for electric two-wheelers. Per capita income, job creation, infrastructure development, and abundant natural resources are the main drivers of economic development in Africa.

Urbanization is higher in Africa than in other emerging economies with higher potential for international brands. Rapid population growth is putting strain on existing transport and infrastructure. Most vehicles used for transport are fuel-driven, resulting in a high oil demand. The issues of fuel shortage, fuel prices, and pollution are caused by ICEs. Africa needs alternative modes of transport that reduce fuel dependency.

For instance, in August 2023, Spiro, an African electric scooter, and motorcycle company, announced that it received new financing of USD 63 million, allowing it to expand its operations to Kenya and Uganda. Spiro has 10,000 vehicles on the roads in three African countries (Benin, Togo, and Rwanda) and plans to add another 15,700 battery-powered vehicles to its fleet.

Government Efforts and Policies to Shape Market’s Upward Trajectory

The government's initiatives for EV adoption has resulted in increasing research and development programs in the region. The government focuses on the adoption of advanced charging stations to enrich the electric two-wheeler experience. The aim is to eventually eliminate combustion engine-driven motorbikes, with government warnings and compliances. The governments are implementing policies and schemes to promote e-mobility. Furthermore, the adoption of electric mobility to reduce vehicular pollution also drives market growth. Nigeria, Kenya, Egypt, and South Africa hold the major share of the African electric two-wheeler market with a market share of 20.28%, 20.94%, 17.74%, and 14.24%.

For instancen September 2023, Kenya’s government announced plans to launch a nationwide electric motorbike fleet. Electric mobility is one of the country’s top priorities to tackle pollution, health issues, and rising fuel costs. President William Ruto and Spiro, an African startup, announced the initiative ahead of next week’s Africa Climate Summit that will be held in Nairobi, the nation’s capital.

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Fast Charging, Lightweight, and Low Maintenance to Fuel Segmental Growth for Lithium-Ion Battery

Segmentation of the African electric two-wheeler market by battery type comprises sealed lead acid, Li-ion, and other battery types. Lithium-ion dominated the market with the market share of 56.05% in 2023FY. Liquid sealed batteries are highly reliable, portable, require low maintenance, and are cost-effective. Leak-proof construction requires no special precautions for electric scooter handling. Manufacturers adopt sealed batteries in inclined positions. The energy density of a lithium-ion battery is higher than that of a conventional lead-acid battery. As a result, the range of an electric motorcycle or scooter can be extended on a single charge, allowing the rider to travel for extended distances. The lighter weight of the battery improves the handling and performance of the two-wheeler. This enhances manoeuvrability and agility as well without losing the power.

For instance, in October 2023, BODAWERK rebranded to GOGO while launching a new electric motorcycle and partnered with Watu to fund expansion in Uganda. By 2024, GOGO plans to have 20,000 drivers using 3 GWh per month. It also plans to have East Africa's biggest lithium-ion (Li-ion) battery pack factory open in 2024.

Future Market Scenario (2024–2031F)

- The new companies entering the African two-wheeler space with advanced battery systems with efficient technology are likely to expand the market size during the forecast period.
- Increased fuel tariffs, prices, and depleting fossil fuel reserves are projected to garner market growth.
- The fast-charging and lightweight technology is anticipated to enhance the upcoming electric two-wheelers market.
- The international partnerships and collaboration to extend the electric two-wheeler fleet is expected to fuel the market growth.

Key Players Landscape and Outlook

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The competitive landscape for the African electric two-wheeler industry holds a mixture of native and international players. The international players focus on setting up their manufacturing space along with the partnerships and government tenders. Furthermore, the competitors focus on bringing new battery technology in the market that deliver efficiency, power, and higher range to scooters and motorcycles. Key player strategy involves strengthening of supply chain, distribution channel and new swappable batteries.

For instance, in July 2023, Roam launched its first Roam Hub, a multi-purpose electric motorcycle charging station in Nairobi, Kenya. The Roam Hub serves as an ecosystem solution for drivers, providing public access to battery charging and rental services as they do their daily operations. The stations are also outfitted with spare parts and staffed by trained technicians who can do maintenance and repair work as needed.

In January 2024, Ampersand secured USD 19.5 million in funding. A significant USD 7.5 million of the total funding was secured as a debt. This debt was managed by Africa’s go green fund (AGG) and will be used to support Ampersand’s three main goals, increasing electric motorcycle battery production, expanding the current battery swap station (BST) infrastructure, and accelerating R&D.

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