

## The Sub-Saharan EV Market

Company: Transatlantic Growth

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### **CASE STUDY**

#### **Summary:**

As part of our international mobility and sustainability research initiatives, we conducted a comprehensive study of the emerging electric vehicle ecosystem across rapidly developing markets. The research focused on long-term EV adoption trends, charging infrastructure development, regulatory frameworks, consumer purchasing behavior, supply chain dependencies, energy accessibility, and investment opportunities shaping the future of electric mobility.

Rather than approaching the sector through a narrow automotive lens, the study examined the broader economic and infrastructural conditions influencing EV scalability, including public transportation systems, grid reliability, urbanization, import dependency, affordability constraints, government incentive programs, and private-sector innovation. This allowed us to identify both immediate commercial opportunities and the structural realities companies must navigate when entering high-growth mobility markets.

#### **Problem:**

For international founders and mobility companies, emerging EV markets present a significant opportunity but also substantial operational complexity. Market conditions vary widely across regions, with differences in infrastructure readiness, consumer affordability, regulatory maturity, and energy accessibility directly impacting adoption potential.

Our research identified several key barriers shaping market development:

- Limited charging infrastructure outside major urban centers.
- High upfront vehicle costs relative to consumer purchasing power.
- Dependence on imported vehicles, batteries, and components.
- Uneven government policy frameworks and inconsistent regulatory support.
- Grid reliability challenges affecting charging scalability.
- Consumer hesitation is tied to maintenance access, battery lifespan, and long-term servicing.

- Infrastructure gaps between commercial fleet adoption and private consumer adoption.
- Fragmented transportation ecosystems require localized mobility solutions rather than one-size-fits-all approaches.

At the same time, the research revealed that EV adoption is accelerating fastest in sectors where electric mobility solves immediate economic or operational problems, particularly commercial fleets, urban transportation, logistics, ride-sharing, and two-wheeled mobility solutions.

Without deep market analysis, companies risk entering these markets with pricing models, infrastructure assumptions, or deployment strategies that fail to align with local economic and operational realities.

**Solution:**

Our research methodology combines policy analysis, infrastructure evaluation, consumer insights, macroeconomic trends, and ecosystem mapping to help companies understand where sustainable mobility markets are heading and how to position themselves effectively within them.

Through this study, we identified several high-growth opportunities across the EV ecosystem, including:

- Fleet electrification solutions for logistics and urban transportation.
- Affordable and mid-market EV offerings tailored to local purchasing power.
- Battery leasing and subscription-based ownership models.
- Charging infrastructure partnerships tied to commercial hubs and urban corridors.
- Energy-integrated mobility systems combining EV deployment with renewable infrastructure.
- After-sales servicing, battery maintenance, and repair ecosystems.
- Localized assembly and regional manufacturing opportunities designed to reduce import dependency.
- Digital platforms supporting fleet management, charging access, and mobility analytics.

The research also highlighted the importance of understanding mobility not simply as transportation, but as an intersection of infrastructure, energy, urban development, consumer economics, and public policy. By analyzing these sectors together rather than independently, we provide founders with actionable market intelligence that supports sustainable expansion strategies and long-term operational planning.

For companies exploring international growth, this level of research reduces uncertainty, identifies scalable entry points, and enables informed decision-making before capital-intensive expansion begins.

