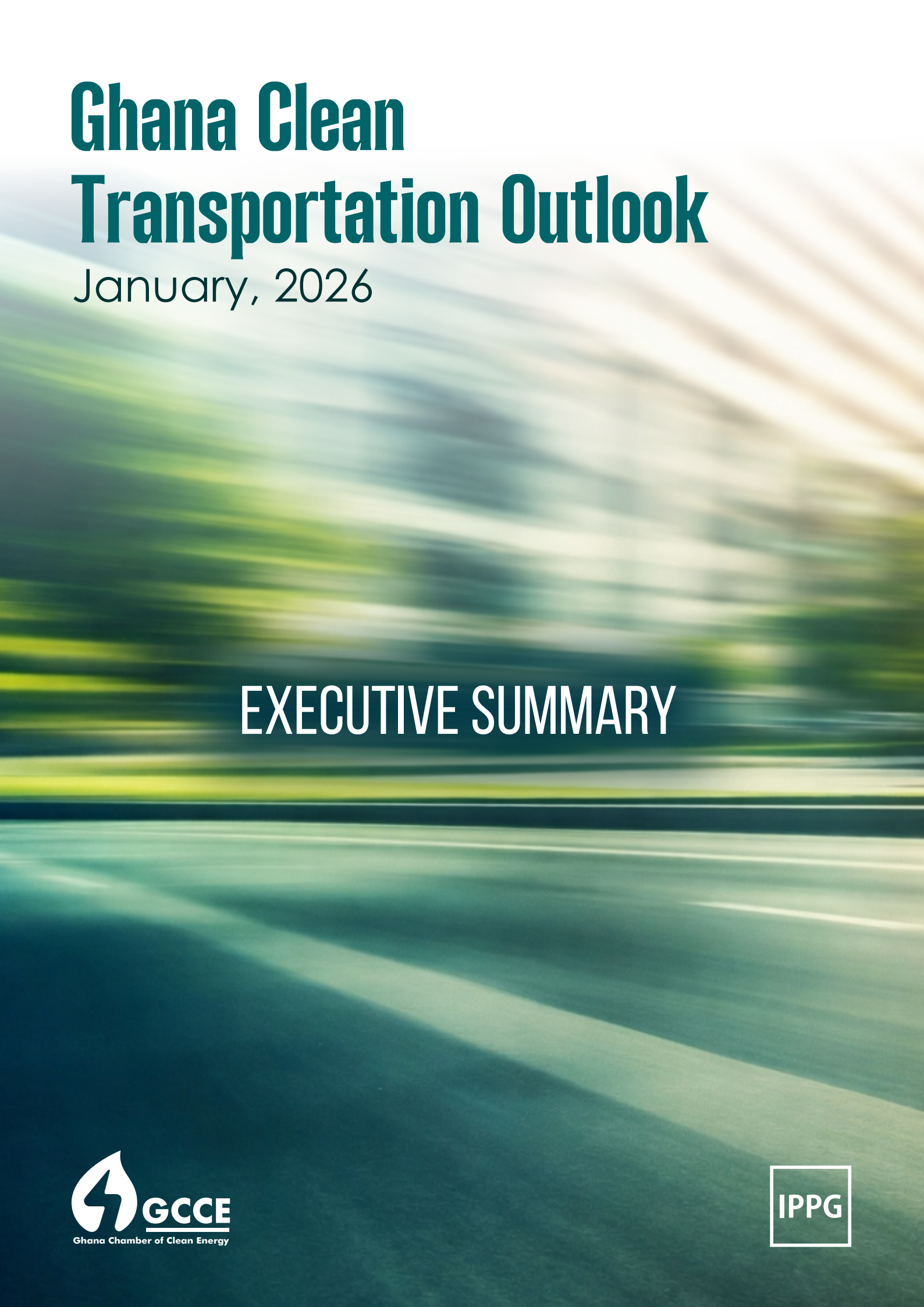
Ghana Clean Transportation Outlook

January, 2026

EXECUTIVE SUMMARY



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GHANA CLEAN TRANSPORTATION OUTLOOK

Joint Publication

by

Ghana Chamber of Clean Energy (GCCE)

&

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About This Publication

This is the first edition of the Ghana Clean Transportation Outlook, developed to examine the market dynamics shaping electric mobility in Ghana and to identify the policy, investment, and business environment needed to accelerate deployment. It responds to the growing gap between policy ambition and market outcomes, and focuses on where adoption is emerging, where constraints continue to limit progress, and how targeted interventions can unlock scale across key segments of the clean transportation sector.

The Outlook is produced by the Ghana Chamber of Clean Energy (GCCE), with analytical and institutional support from its parent organization, the International Perspective for Policy & Governance (IPPG). It marks the beginning of an annual series intended to track progress, update evidence, and refine policy recommendations over time. This edition focuses on clean transportation as a deliberate starting point in a broader analytical effort. Future publications will expand the scope to other priority areas of Ghana's clean energy sector including renewable power generation, clean cooking, and enabling energy systems toward the development of a comprehensive Ghana Clean Energy Outlook.

About GCCE

The Ghana Chamber of Clean Energy (GCCE) is a non-profit and the nation's premier industry association committed to advancing the growth, competitiveness, and long-term impact of Ghana's clean and renewable energy sector.

The Chamber operates with a dual focus: first, it provides a unified platform for clean energy businesses to promote, protect, and strengthen their collective interests and second, it champions the strategic role of clean energy in accelerating Ghana's just energy transition and contributing to inclusive job creation, socio-economic development, and climate resilience.

About IPPG

The International Perspective for Policy & Governance (IPPG) is an independent international development think tank dedicated to strengthening policy implementation, governance, and sustainable development across Africa. IPPG provides policymakers with data-driven policy recommendations to foster effective governance, informed decision-making, and socioeconomic progress. Drawing on research, comparative policy learning, and strategic partnerships, IPPG adapts global best practices to African contexts to help shape a more prosperous, resilient, and inclusive future for the continent.

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Disclaimer

This publication reflects the analysis and views of the author and does not necessarily represent the positions of all members of GCCE, and all institutions, stakeholders, or market actors consulted in the course of this work. The findings and recommendations are intended to inform policy dialogue and investment decision-making and should not be interpreted as endorsement of any specific company, product, or commercial strategy. We regret any errors or omissions that may have been unwittingly made.

Design & Layout

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EXECUTIVE SUMMARY

1. Purpose and Strategic Context

Ghana's transport sector is a major driver of economic activity, yet it remains overwhelmingly dependent on fossil fuels, exposing the economy to fuel price volatility, rising emissions, urban air pollution, and fiscal pressure from petroleum imports. Transport electrification has therefore emerged as a strategic priority within Ghana's climate commitments, energy transition agenda, and industrial policy ambitions. Despite strong policy intent, however, Ghana's clean transportation transition remains at an early and uneven stage, with limited market scale and weak translation of policy into sustained market outcomes.

2. Core Finding 1: Ghana's e-mobility transition is segmented, not uniform

The Outlook finds that Ghana's clean transportation market is evolving through distinct pathways, rather than a single coherent transition. Passenger electric vehicles (EVs) and electric two- and three-wheelers differ fundamentally in cost structures, usage patterns, financing needs, infrastructure requirements, industrial growth, and readiness for scale. Uniform policy instruments applied across these segments risk misalignment with market realities and may inadvertently slow adoption rather than accelerate it.

3. Core Finding 2: Cost and financing, not technology, are the major constraints

Across all segments, high upfront costs driven by fiscal treatment, combined with limited access to appropriate financing, constitute the most immediate barriers to adoption. EVs currently face higher effective tax incidence than ICE vehicles, while electric two- and three-wheelers lack differentiated fiscal support despite their commercial viability. Financing markets remain conservative, with short loan tenures, high interest rates, and limited risk appetite, suppressing demand even where operational savings are clear.

4. Core Finding 3: Market formation is being led by the private sector, largely unsupported

Early progress in Ghana's clean transportation ecosystem has been driven predominantly by private actors importing vehicles, investing in local assembly, deploying charging and battery-swapping infrastructure, and developing service-linked business models. This market formation is occurring with limited public incentives, limited regulatory clarity, and high investor risk.

The persistence of private initiativeindicates underlying demand and entrepreneurial capacity, but the absence of targeted public support is constraining scale and sustainability.

5. Core Finding 4: Electric two- and three-wheelers represent the most immediate industrial scale opportunity

Electric motorcycles and tricycles demonstrate stronger near-term industrial viability than passenger EVs due to their role as income-generating assets, high utilization rates, and compatibility with battery-as-a-service and fleet-based models. This segment is already showing early signs of local assembly, service integration, and demand aggregation, making it structurally better suited for early industrial deepening than passenger EVs at this stage of market development.

6. Core Finding 5: Energy and tariff uncertainty undermines charging economics

The absence of a dedicated electricity tariff for EV charging and battery-swapping infrastructure significantly weakens the operating economics of electric mobility (e-mobility). Commercial tariff treatment increases costs for operators, erodes the fuel-cost advantage of EVs, and discourages private investment in charging infrastructure, particularly outside high-income urban areas.

Priority Policy Recommendations

Short Term (0-2 Years)

7. Recommendation 1: Implement time-bound import-duty reductions

Government should introduce a clearly defined 3–5-year import-duty exemption for passenger EVs and electric two- and three-wheelers to build the market demand for e-mobility in Ghana. Where full exemptions are not feasible, duties should be reduced to parity with ICE vehicles, with targeted relief for fleets and commercial operators to accelerate early adoption. Beyond the eight-year waiver for CKD/SKD imports by registered EV and electric two- and three-wheeler assembly firms, the government should further identify and approve supplementary incentives aligned with the specific operational needs of assembly firms already active in the market to unlock greater market demand.

8. Recommendation 2: Issue implementation guidelines for 2024 budget fiscal incentives

Policy credibility requires converting announced incentives into enforceable measures. Clear implementation guidelines should be issued for the EV import-duty waiver for public transportation announced as part of the 2024 budget, explicitly defining what qualifies as "public transport," including eligible vehicle types, operators, and use cases. Predictable and transparent application is essential to reduce investor uncertainty.

9. Recommendation 3: Introduce electricity tariff relief for charging and battery-swapping

Non-commercial electricity tariff relief for EV charging and battery-swapping infrastructure would lower ongoing operating costs, improve commercial viability, and support the geographic expansion of charging networks. This would help preserve the cost advantage of e-mobility for users and fleet operators, particularly during the market-formation phase.

10. Recommendation 4: Introduce targeted tax incentives to support renewable energy–based e-mobility charging

Targeted tax incentives provided by government for renewable energy developers and IPPs investing in EV charging and battery-swapping infrastructure would reduce upfront capital costs, enable innovative financing and ownership models, and accelerate the deployment of clean charging infrastructure. These effects would make public EV charging more affordable and strengthen the long-term economics of e-mobility.

11. Recommendation 5: Adopt segment-specific implementation guidelines under the National Electric Vehicle Policy

Distinct implementation frameworks must be adopted under the National Electric Vehicle Policy for passenger EVs, electric two- and three-wheelers, and public transport to reflecting their different economics, stages of market development, and policy needs. This differentiation is essential to ensure that fiscal incentives, financing instruments, and regulatory measures are targeted, sequenced, and effective, rather than diluted by a one-size-fits-all approach.

Medium Term (3-5 Years)

12. Recommendation 6: Expand EV-specific financing and risk-sharing mechanisms

Government should create and leverage partnerships with DFIs, climate finance vehicles and funds, and financial institutions to expand EV-specific financing instruments, including leasing, fleet finance, battery-separation models, and partial risk-sharing facilities. These mechanisms are critical to extending loan tenures, lowering effective interest rates, and broadening access beyond high-income consumers.

13. Recommendation 7: Strengthen demand-responsive local assembly and industrial development

Strengthened industrial policy should follow market uptake. Once demand for passenger EVs grows, policy incentives should be reinforced to expand local assembly to support a gradual transition away from import-led growth. For electric two- and three-wheelers, where demand is already accelerating and local assembly is more established, policy can progressively shift toward selective component manufacturing as volumes grow and domestic supply capabilities mature. This approach ensures that industrial development follows proven demand, limits fiscal risk, and anchors localization in commercially viable market conditions.

14. Recommendation 8: Strengthen regulatory standards and consumer protection frameworks

To aid market expansion, EV-specific regulatory standards should be introduced, including battery health certification, safety inspections, and quality assurance for imported and locally assembled vehicles. These measures are essential for consumer protection, insurance underwriting, financing, and the development of secondary markets.

15. Strategic Outlook

Ghana's clean transportation transition can be accelerated through evidence-driven policy action that aligns incentives with real market conditions. Prioritizing market formation, reducing cost and risk for early adopters, and strengthening segments where strong commercial viability already exists will crowd in private investment and lay the foundation for a durable, competitive, and inclusive clean transportation ecosystem. With disciplined implementation and continuous monitoring, Ghana can translate strong policy ambition into tangible economic, environmental, and industrial outcomes.

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