

MARKET INTELLIGENCE STUDY

Rail in Africa

The network, the installed base, the projects
and where the opportunity sits

September 2026

Long-haul and heavy-haul freight

Intercity and high-speed passenger

Urban rail: metro, light rail, monorail, commuter

Infrastructure, rolling stock, operations and maintenance



All figures sourced and tiered by source type. Source register at the end of the study. Maps are schematic.

CONTENTS

What this study covers

Section	Subject
Executive summary	A continent moving from building track to running railways
1	The network today: scale, gauges, electrification and country snapshots
2	The installed base, the largest fleet programmes and what the market is worth
3	The projects: North, East, Central and Southern, West Africa, urban rail, and recent signals
4	Segment view: long-haul freight, intercity and high-speed, urban rail
5	Masterplans and expansion plans
6	Challenges
7	Key findings and strategic implications: where the opportunity sits
Sources	Sources and methodology, with source tiers
Disclaimer	Disclaimer, copyright and publisher

How to read this study. Every figure carries a reference in the form [S1], which points to the source register at the end. Each source is tiered: T1 primary, T2 secondary, T3 reference compilation. Where sources report different figures for the same item, the study shows the range rather than choosing one. Maps are schematic: alignments are drawn between principal cities to show structure, not surveyed routes. Figures are as reported publicly up to 21 September 2026 and should be rechecked before any commercial decision.

EXECUTIVE SUMMARY

A continent moving from building track to running railways

Africa is in the middle of its largest rail investment cycle in generations. High-speed trains are entering trial service in Egypt, Morocco is extending its high-speed line towards Marrakech, Tanzania is completing an electrified standard gauge spine to Lake Victoria, and mineral corridors are being handed to long-term operators. The opportunity is no longer only in building track. It is increasingly in running railways well.

85,000

route-km of railway across the continent, using multiple standards [S1]

90%

of Africa's freight still moves by road, the headroom rail is chasing [S51]

2,000 km

high-speed network planned in Egypt, first line in trial operation [S17, S18]

30 years

term of the new operating concessions on the Lobito and TAZARA corridors [S6, S9]

The starting point is uneven. The inherited network is largely narrow gauge, built to move minerals and crops to the coast, and much of it runs well below capacity or not at all. Around 61 percent of operated lines are Cape gauge and around 20 percent standard gauge [S1]. Some national networks have shrunk sharply: Ghana went from 947 km operating in 1960 to 160 km in 2020 [S39].

The new build is different in kind. New lines are standard gauge, largely electrified and designed for heavy axle loads of 22.5 t or more [S1]. That creates a second, parallel installed base alongside the legacy fleets, with its own maintenance, spares and skills needs.

The buyer is changing. The DRC signed a 30-year concession for more than 1,000 km of the Lobito Corridor in August 2026 [S6, S7], the TAZARA line is moving to a long-term concession with state ownership retained [S9], and South Africa has opened its freight network to 11 private train operators [S27]. Where a ministry once bought construction, an operator now buys availability over decades.

The risk is in execution, not ambition. Financing gaps, interoperability between gauges and power systems, asset security and the slow ramp-up of volumes are the recurring constraints. They are also where specialist suppliers earn their place.

The short read. For suppliers of rolling stock, components, signalling, electrification and maintenance, the next decade in Africa is defined by two markets at once: renewing and rehabilitating the legacy narrow-gauge base, and supporting the new standard gauge fleets as they leave warranty and enter long service lives under long-term operators.

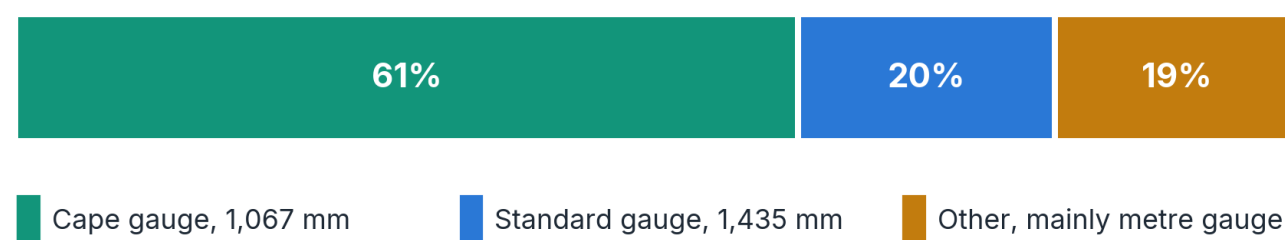
SECTION 1

The network today

A large, fragmented and underused network, built for export, now being reconnected and extended.

1.1 Scale and structure

The continental network runs to about 85,000 route-km and uses multiple technical standards [S1]. Cape gauge (1,067 mm) dominates southern, central and parts of eastern Africa, metre gauge is widespread in francophone West Africa and historically in East Africa, and North Africa is mostly standard gauge [S1, S2]. Only about 15 percent of the network is electrified, with 3 kV DC the most common system and 25 kV AC used on newer lines [S1]. Most rolling stock uses AAR type couplers [S1].



Share of operated lines by gauge. Other is mainly metre gauge [S1].

A longer baseline shows how much of the network has been dormant. At the end of 2008 the Sub-Saharan network measured around 70,000 km, of which about 55,000 km was being operated [S2]. The same baseline noted that gauges met in only a few places, and that this would become a real issue as new connecting lines were built [S2]. That is exactly the stage the continent has now reached.

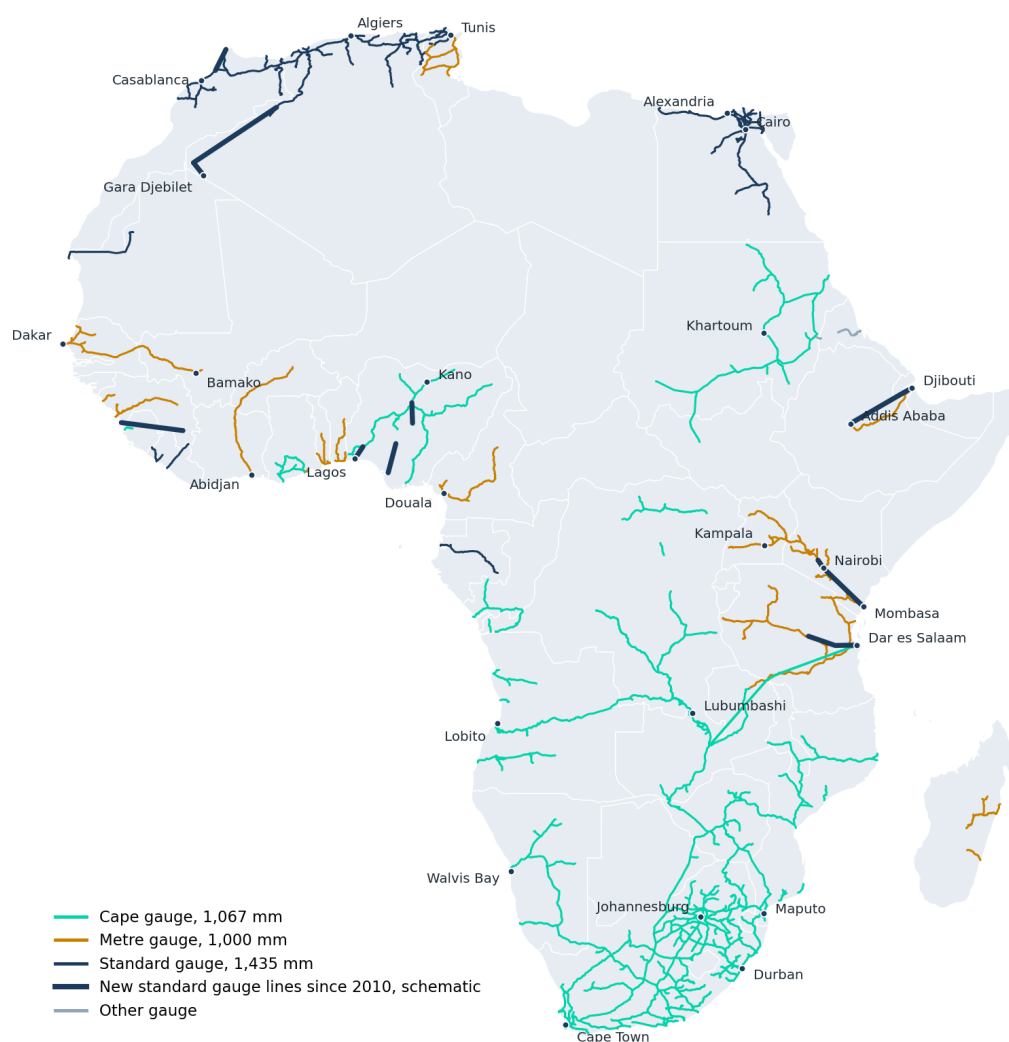
1.2 Country snapshots

National networks showing the range of starting points, from reform of a large freight system to rebuilding lines that had stopped.

Country	What exists	Where it is heading
South Africa	Largest freight system on the continent. 226 Mt in 2017/18, 152 Mt in 2023/24 [S29].	167.9 Mt in 2025/26 [S52]. Open access, 250 Mt target by 2030 [S45].
Egypt	Nile valley trunk network, metro and monorail in Cairo [S21, S43].	2,000 km high-speed network planned across three lines, first line in trial operation [S17, S18].
Morocco	Africa's first high-speed service, on 186 km of new line between Tangier and Kenitra at 320 km/h [S24].	430 km extension to Marrakech due in 2029 [S22, S23].
Algeria	4,722 km network in 2023 [S25]. 950 km heavy-haul mining line opened February 2026 [S26].	National target of 15,000 km by 2030 [S25].
Tanzania	Electrified SGR operating between Dar es Salaam and Dodoma since 2024 [S10, S12].	2,809 km of SGR on completion of both phases, within a planned 4,752 km network [S10, S11].
Ethiopia	2,185 km, including 1,401 km of electrified standard gauge and 784 km of metre gauge [S37].	Standard gauge link to the port of Djibouti forms the backbone.

Country	What exists	Where it is heading
Nigeria	Standard gauge operating on Lagos to Ibadan, Abuja to Kaduna and Warri to Itakpe [S31].	Kaduna to Kano 68 percent complete and due December 2026, extension to Maradi in Niger [S30].
Kenya	Standard gauge from Mombasa to Nairobi, ending at Suswa [S15].	Extension to Kisumu and Malaba launched March 2026 [S15].
Senegal	1,087 km historic metre gauge, 602 km operational in 2024 [S38].	TER extension to the airport [S36].
Ghana	947 km in 1960, 160 km operational in 2020 [S39].	Standard gauge rebuilding programme.

Map 1. The rail network by gauge



Network geometry from public railway line data, which records lines as built, including some currently out of service [S82]. Gauge is assigned by country, with mixed-gauge countries simplified to their main gauge; standard gauge lines built since 2010 are drawn schematically between their end points. Gauge data [S1, S2, S37, S38]. Boundaries [S42]; boundaries shown do not imply any position on their status.

SECTION 2

The installed base and the fleet pipeline

No consolidated continental register exists. The base has to be built operator by operator, and that gap is itself a market signal.

Rolling stock data in Africa sits with individual operators and is published unevenly, if at all. For anyone planning maintenance, spares, overhaul or leasing, the installed base has to be assembled from the bottom up: from operators, concession documents, procurement notices and delivery announcements. The table below brings together the fleet facts and commitments that are publicly documented.

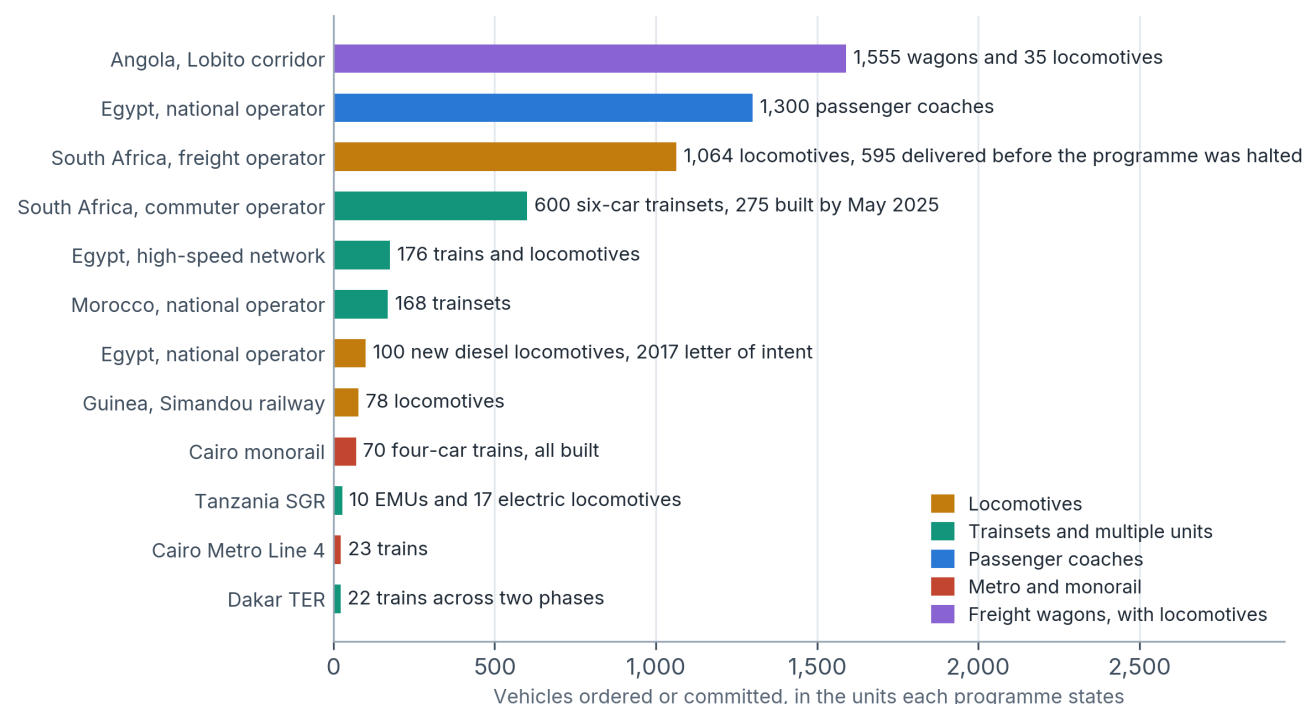
Operator or project	Fleet facts and commitments	Ref
Egypt high-speed network	41 high-speed trains, 94 regional trains and 41 locomotives for the full network. Line 1 operating plan: 15 high-speed, 34 regional, 14 freight locomotives.	[S17, S18]
Cairo Metro Line 4	23 trains for the line. Five delivered by 5 September 2026 and under test, further units in manufacture.	[S19]
Morocco, national operator	168 trainsets ordered for USD 2.9 bn: 18 high-speed, 40 intercity and 110 urban units.	[S22]
Lobito Atlantic Railway, Angola	In service January 2026: 360 wagons and 28 locomotives. Investment programme: 1,555 wagons and 35 locomotives.	[S8, S41]
Simandou railway, Guinea	78 locomotives ordered for the corridor operator, first deliveries September 2025.	[S70]
South Africa, commuter operator	600 six-car trainsets ordered, 275 built by May 2025, completion targeted by 2029.	[S85]
South Africa, freight operator	1,064 locomotives ordered in 2014, 465 diesel and 599 electric. 595 delivered before the programme was halted in 2019.	[S83, S84]
Egypt, national operator	1,300 passenger coaches under a EUR 1 bn contract, deliveries from 2020. Separately, a 2017 letter of intent for 100 new diesel locomotives, and a contract to modernise 100 existing locomotives.	[S86, S87, S88]
Cairo monorail	70 four-car trains, 280 cars, all completed by January 2024, with 30 years of operations and maintenance included.	[S89]
Tanzania SGR, first fleet	10 eight-car EMUs and 17 electric locomotives, delivered 2023 to 2024.	[S90]
Kenya SGR	First delivery in 2017 of 18 locomotives and 60 double-stack container wagons, with further wagon batches since.	[S44]
Dakar TER, Senegal	15 vehicles on phase 1, with 7 further trains ordered for phase 2.	[S36]
Lagos Blue Line	Electric metro trains, 100 km/h maximum, operated at 80 km/h.	[S33]
Abidjan Metro Line 1	Metro trains with CBTC signalling for a 37 km elevated line.	[S35]
South Africa, open access	Rail policy expects operator investment in rolling stock and leasing companies, with up to R100 bn of new investment. First locomotive shipment for a private operator arrived August 2026.	[S28, S56]
Tanzania SGR, next fleet	Planned SGR rolling stock procurement under joint cost and scope review, within a USD 2.5 bn cooperation commitment.	[S53]

Operator or project	Fleet facts and commitments	Ref
Legacy fleets, rehabilitation	Tanzania revived five metre gauge locomotives in its own workshop, Botswana returned four locomotives to service, Uganda had four locomotives assessed, and the DRC is expanding a national operator fleet.	[S57, S58, S59, S60]

A base splitting in two. The legacy narrow-gauge fleets are old, largely diesel, and need rehabilitation, overhaul and component supply. The new standard gauge fleets are young, electric and currently under manufacturer warranty. As those warranties expire over the next few years, support, spares and maintenance for these fleets become a market in their own right.

2.1 The largest documented fleet programmes

Public announcements alone show the scale of fleet investment. Twelve documented programmes since 2013 account for more than 5,000 locomotives, trainsets, coaches and wagons ordered or committed. South Africa's commuter operator is taking 600 six-car trainsets, with 275 built by May 2025 [S85]. Its freight operator ordered 1,064 locomotives in 2014, of which 595 were delivered before the programme was halted in 2019 [S83, S84]. Egypt's national operator is receiving 1,300 new passenger coaches [S86], and Cairo's monorail fleet of 70 four-car trains is fully built [S89].



Largest publicly documented fleet programmes since 2013, in the units each programme states. Compiled by KhahanA Insights from public announcements [S8, S17, S18, S19, S22, S36, S70, S83, S84, S85, S86, S87, S89, S90]. The Egyptian letter of intent is shown as a commitment, not a confirmed order. A selection of documented programmes, not a census of all orders.

The maintenance signal. Fleet size and fleet availability are different things. In 2022, about 300 of South Africa's freight locomotives were reported parked, partly for lack of spares [S91], and Egypt's national operator has contracted the modernisation of 100 existing locomotives rather than replacing them [S88]. Every programme in this chart becomes a maintenance, spares and overhaul market for decades after delivery.

2.2 What the market is worth

The market for rail technology products and services in Africa and the Middle East was put at slightly more than EUR 8 bn a year in 2018, with about one third in the Middle East [S47]. That implies roughly two thirds, in the order of EUR 5 bn a year, for Africa. The same estimate expected average growth of 4 percent a year to 2022, and a near quadrupling of metro and light rail networks across the region [S48].

An earlier baseline, for Africa alone, showed track systems as the largest supply segment at EUR 1.83 bn, or 33.8 percent of spending, and rolling stock growing from EUR 2.04 bn in 2012 to EUR 3.01 bn by 2017 [S49]. Freight performance across Africa and the Middle East reached 213 bn tonne-km in 2015, around 2 percent of the world total [S50].

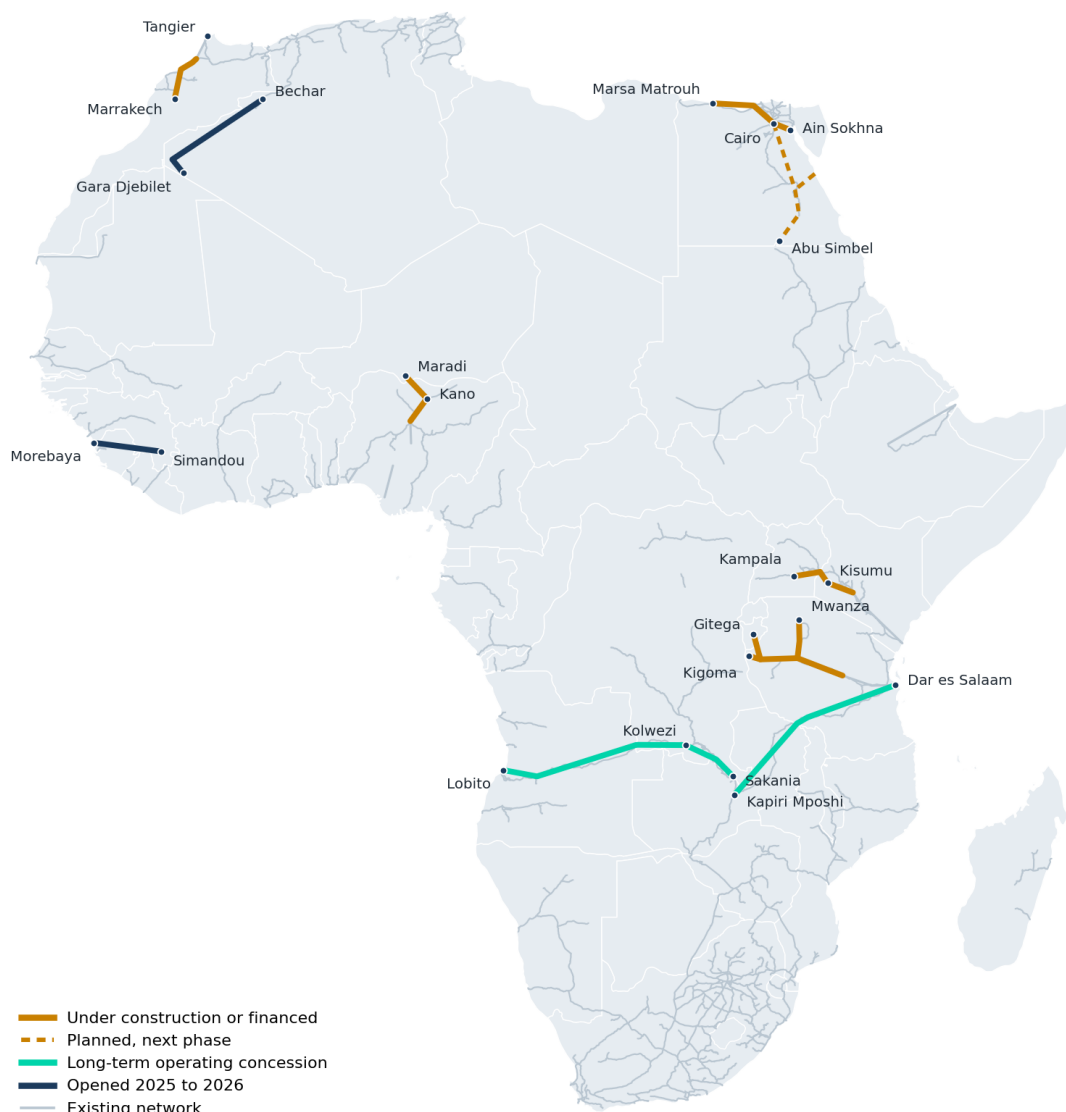
Reading the numbers. These figures predate the current construction cycle: the Egyptian high-speed network, the Moroccan extension, most of the Tanzanian SGR and the new mineral concessions were not in them. They are a baseline, not a forecast, and should be refreshed with current data before being used in a business case. This study uses only market figures that trace to a named, dated source.

SECTION 3

The projects

The construction pipeline, region by region, with status as reported up to September 2026.

Map 2. Projects under construction, financed or recently opened



Projects drawn schematically; existing network from public railway line data [S82]. Urban rail is shown on Map 3. Project data [S6, S8, S9, S11, S14, S15, S17, S18, S22, S26, S30, S69]. Boundaries [S42]; boundaries shown do not imply any position on their status.

3.1 North Africa

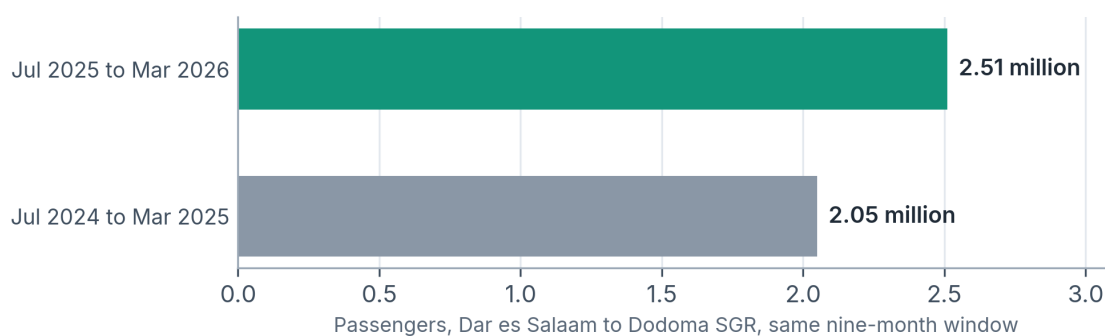
Project	Scope	Status	Ref
Egypt, high-speed Green Line	660 km from Ain Sokhna to Alexandria and Marsa Matrouh, 21 stations and a control centre.	Trial operations from mid-September 2026 for six months before public service.	[S17]
Egypt, Blue and Red Lines	About 1,100 km from Cairo to Abu Simbel, and about 225 km from Luxor to Hurghada.	Following phases of the planned 2,000 km network.	[S18]
Cairo Metro Line 4	Phase 1: 19 km, 17 stations. Phase 2: 26.9 km, 21 stations to New Cairo.	Phase 1 due in the first half of 2028. Phase 2 started.	[S19, S20]
Cairo East of Nile monorail	56.5 km, 22 stations.	Opened to the public 6 May 2026.	[S43]
Morocco, Kenitra to Marrakech	430 km high-speed extension at 320 km/h, serving Casablanca airport.	About 30 percent complete, delivery set for September 2029.	[S22, S23]
Algeria, Bechar to Gara Djebilet	950 km heavy-haul mining line, 45 bridges.	Opened 1 February 2026.	[S26]

Morocco's extension is budgeted at 53 bn dirhams excluding rolling stock, with a further 14 bn dirhams to adapt the existing network [S23]. Egypt's first line is part of a logistics corridor between the Red Sea and the Mediterranean [S17].

3.2 East Africa

Project	Scope	Status	Ref
Tanzania SGR	Electrified standard gauge from Dar es Salaam to Mwanza, with a western branch towards Kigoma and Burundi.	Dar es Salaam to Dodoma operating. Makutupora to Isaka (about 430 km) financed with over USD 2.33 bn, Isaka to Mwanza with USD 559 m. Full line targeted for 2030.	[S11, S12]
Kenya SGR Phase 2B and 2C	About 264 km Naivasha to Kisumu with a port branch, then Kisumu to Malaba.	Construction launched 19 March 2026. Financing not yet fully secured.	[S15, S16]
Uganda, Malaba to Kampala	273 km including a 30.3 km branch, freight at 120 km/h.	Early works under way. Financial close targeted for November 2026.	[S13, S14]
Tanzania, Tabora to Kigoma	Western SGR branch towards Lake Tanganyika, Burundi and the DRC.	Foundation stone laid July 2026 for a USD 2.74 bn project. Phased interconnection with the DRC agreed.	[S54, S67]
TAZARA	1,860 km linking the Zambian Copperbelt with Dar es Salaam.	Long-term concession valued at USD 1.4 bn, state ownership retained.	[S9]

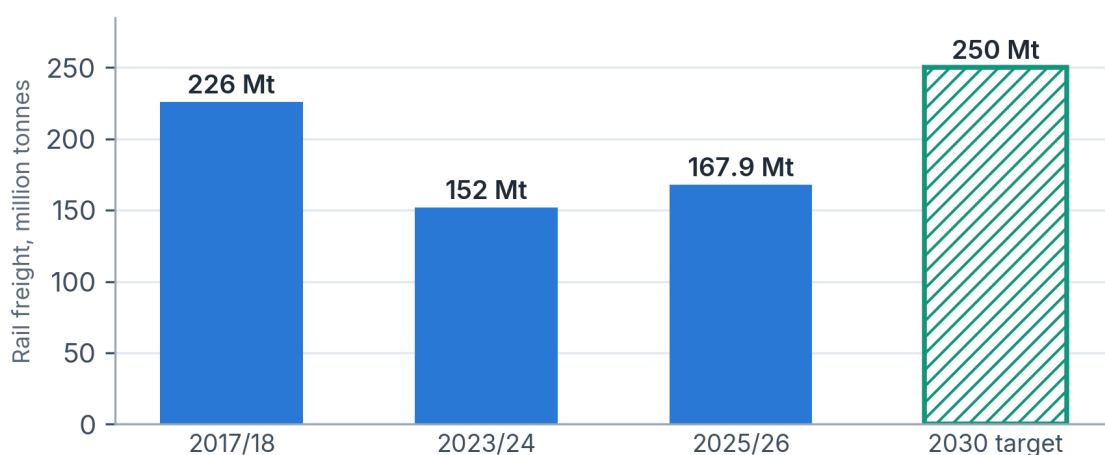
Demand on the first Tanzanian section is rising: 2.51 million passengers between July 2025 and March 2026, against 2.05 million a year earlier, and 102,452 tonnes of freight in its first period of cargo service [S10]. Uganda expects its line to carry about 25 million tonnes of freight and 2.5 million passengers a year once operational [S14].



Dar es Salaam to Dodoma SGR passengers, same nine-month window each year [S10].

3.3 Central and Southern Africa

Project	Scope	Status	Ref
Lobito Corridor, Angola	1,300 km from the port of Lobito to Luau on the DRC border.	30-year concession since 2022. 12 trains a week, rising to 20 by 2027.	[S8]
Lobito Corridor, DRC	Between 1,004 km and 1,037 km from Dilolo to Sakanika through the Copperbelt.	30-year concession signed 26 August 2026. Investment reported at USD 1.258 bn indicative, up to about USD 1.8 bn over the concession.	[S6, S7]
South Africa, open access	Rail access agreements with 11 private operators on five corridors.	Signed May 2026. 24 Mt of initial capacity, up to 52 Mt within five years. First services in 2026/27. Capital investment of R23.3 bn in 2025/26, with R14.8 bn of grant funding approved.	[S27, S52]



South African rail freight volumes, with the 2030 target shown hatched [S29, S52, S45].

3.4 West Africa

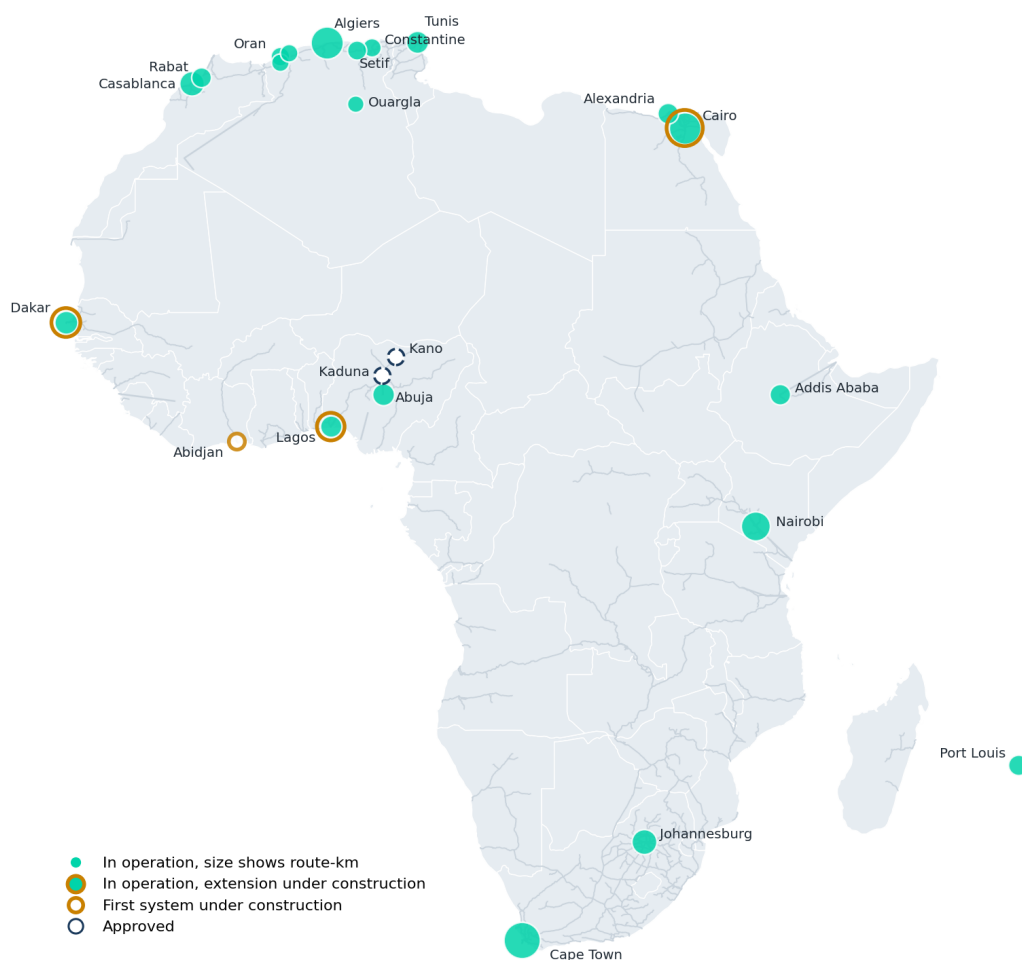
Project	Scope	Status	Ref
Guinea, Simandou railway	More than 600 km of new heavy-haul standard gauge from the Simandou iron ore mines to a new port in Forecariah.	In operation. First ore shipped December 2025, capacity up to 120 Mt a year at full ramp-up.	[S69, S71, S72]
Nigeria, Kaduna to Kano	203 km standard gauge.	68 percent complete, due December 2026.	[S30]
Nigeria, Kano to Maradi	296 km main line to Maradi in Niger, plus 104 km Kano to Dutse branch.	Main line due December 2026. Branch 63 percent complete, due December 2027.	[S30]
Nigeria, Abuja to Katsina services	Northern standard gauge services.	Services expected to start in January 2027.	[S40]
Lagos Rail Mass Transit	Blue Line: 27 km planned. Red Line phase 1: 26.3 km, eight stations.	Blue Line phase 1 (13 km) open since September 2023. Red Line phase 2, 11 km to Marina, next.	[S32, S33]
Abidjan Metro Line 1	37 km elevated line, 18 stations.	Under construction, 605 m lagoon viaduct completed, opening projected for 2027.	[S34, S35]
Dakar TER	55 km airport and commuter link, 160 km/h.	Phase 1 open since 2021, phase 2 to the airport.	[S36]

Nigeria has also set out a long-term high-speed plan between Lagos and Maiduguri and approved light rail for Lagos, Kano and Kaduna [S31].

3.5 Urban rail

Africa already runs a substantial urban rail base, concentrated in North Africa, with new systems opening south of the Sahara. Cairo is the continent's largest urban network, combining three metro lines, a monorail opened in 2026 and a light rail line [S74, S43, S77]. Algeria has a metro in Algiers and trams in seven cities [S75, S73, S81]. Morocco, Tunisia, Ethiopia, Mauritius and Nigeria operate light rail or tram systems, and Abidjan is building the first metro in West Africa [S73, S78, S35].

Map 3. Urban rail systems



Schematic. Bubble size reflects route-km in operation across all urban modes in each city, including commuter networks where they serve the city region. Data [S73, S74, S75, S76, S77, S78, S79, S80, S81, S32, S33, S35, S36]. Boundaries [S42]; boundaries shown do not imply any position on their status.

City	Systems in operation	Next step	Ref
Cairo, Egypt	Metro, 3 lines, 106.8 km. Monorail, 56.5 km, opened 2026. Light rail, 70 km.	Metro Line 4 phase 1, 19 km, due 2028. Phase 2 started.	[S74, S43, S77, S19, S20]
Alexandria, Egypt	Tram network, 32 km.	In operation.	[S73]
Algiers, Algeria	Metro, 18.5 km. Tram, 23.2 km. Suburban rail, 7 lines, 212 km.	In operation.	[S75, S73, S76]
Other Algerian cities	Trams in Oran (18.7 km), Constantine (18.2 km), Setif (22.4 km), Sidi Bel Abbès (13.7 km), Mostaganem (14 km) and Ouargla (9.7 km).	Opened between 2013 and 2023.	[S73, S81]
Casablanca, Morocco	Tram, 4 lines, 74 km, 110 stations.	In operation.	[S80]
Rabat and Sale, Morocco	Tram, 2 lines, 26 km.	In operation.	[S73]
Tunis, Tunisia	Light metro, 6 lines, 45.2 km.	In operation.	[S73]
Addis Ababa, Ethiopia	Light rail, 2 lines, 31.6 km, opened 2015.	In operation.	[S73]
Port Louis area, Mauritius	Light rail, 30 km, opened 2020.	In operation.	[S73]
Lagos, Nigeria	Blue Line, 13 km. Red Line, 26.3 km.	Blue Line to 27 km, Red Line phase 2, 11 km.	[S32, S33]
Abuja, Nigeria	Light rail, 2 lines, 42.5 km. Service resumed May 2024.	In operation.	[S78]
Kano and Kaduna, Nigeria	None yet.	Light rail approved.	[S30]
Abidjan, Cote d'Ivoire	None yet.	Metro Line 1, 37 km, 18 stations, opening projected 2027.	[S34, S35]
Dakar, Senegal	TER regional express, 55 km.	Phase 2 to the airport.	[S36]
Nairobi, Kenya	Commuter rail, 4 lines, 160 km.	In operation.	[S77]
Johannesburg and Pretoria, South Africa	Gautrain, 80 km, 10 stations.	In operation.	[S79]
Cape Town, South Africa	Metrorail commuter network, 4 lines, 423 km.	In operation.	[S77]

Commuter networks run largely on the national rail network and are shown for completeness; their length is not dedicated urban track. Most urban route lengths in this table rest on T3 reference compilations and should be read as indicative.

3.6 Recent signals: the pipeline behind the headlines

Beyond the flagship projects, the steady flow of procurement notices, rehabilitation works and design studies shows how broad the market has become. A selection from the first half of September 2026 alone:

Country	Signal	Segment	Ref
South Africa	20 rail sidings opened to private-sector leasing and investment.	Infrastructure access	[S55]
Senegal	Preliminary design advancing for a Dakar to Tambacounda standard gauge line.	New line	[S61]
Namibia	Prequalification opened for the Kranzberg to Otjiwarongo line upgrade.	Rehabilitation	[S62]
Ghana	Plans advancing for a 20 km line from Takoradi port to the Nsuta bauxite and manganese area.	Mineral rail	[S63]
Kenya	Earthworks 70 percent complete on the Voi to Taveta metre gauge rehabilitation.	Rehabilitation	[S64]
Côte d'Ivoire	International procurement opened for railway equipment.	Equipment	[S65]
Madagascar	Planned railway procurement packages set out, covering track and signalling.	Rehabilitation	[S66]
Angola	Political risk guarantees issued for private investment in the Lobito railway corridor.	Finance	[S68]
Nigeria	Abuja to Katsina rail services expected to start in January 2027.	New service	[S40]

Development finance is lining up behind rail. The African Development Bank is building a continent-wide rail investment pipeline aimed at moving high-volume freight from road to rail and linking railways with ports, airports and industrial zones, including a USD 1 bn corporate loan to South Africa's freight rail and port operator [S51].

SECTION 4

Segment view

Each segment has its own buyer, its own risks and its own route to market.

	Long-haul freight and heavy haul	Intercity and high-speed passenger	Urban rail
What is happening	Mineral corridors moving to 30-year concessions. New heavy-haul lines. Open access in South Africa.	High-speed in Egypt and Morocco. New intercity standard gauge in Tanzania, Nigeria, Kenya.	Metro, monorail and light rail in Cairo, Lagos, Abidjan and Dakar, with more cities approved.
Infrastructure	Track rehabilitation on legacy corridors, heavy axle loads, bridges, sidings and terminals.	Electrification, signalling and control centres on new lines, adaptation of existing lines.	Viaducts and tunnels, depots, power supply, CBTC signalling, fare systems.
Rolling stock	Locomotive and wagon fleets for new operators, rehabilitation of legacy stock, leasing structures.	High-speed and regional trainsets, and adapted fleets for classic compatible services.	Metro and light rail vehicles, with long-term fleet support.
Operations and maintenance	Availability-based maintenance under long concessions, desert and remote operating conditions.	Fleet support as warranties expire, depot operations, skills.	Operating and maintenance contracts for new systems, often with an international operator.
Main challenge	Ramping volumes to design capacity, asset security, cross-border operation.	Financing and demand build-up, integration with the legacy network.	Long delivery timelines, funding, integration with bus and informal transport.

4.1 Long-haul freight and heavy haul

This is the segment where Africa's rail economics are strongest, because minerals move in volume over long distances to the coast. The Angolan section of the Lobito corridor is already running regular trains [S8], the DRC section now has a long-term operator [S6], and Algeria has opened a 950 km line purely to move iron ore [S26]. The gap between present and design volumes is large. On Lobito, the stated 2026 target of 240,000 tonnes of copper compares with a long-run design figure of 4.6 million tonnes a year [S41]. Every step up that curve needs locomotives, wagons, track capacity and maintenance.

4.2 Intercity and high-speed passenger

Morocco has operated high-speed rail since 2018 and is extending it [S23, S24]. Egypt is entering trial operation on the first line of a planned 2,000 km network [S17]. Tanzania shows how quickly demand can build on a new electrified intercity line [S10]. These fleets are new, but they are long-life assets, and the maintenance regimes, depots and skills that keep them available are only now being established.

4.3 Urban rail

Urban rail is the fastest-moving passenger segment. Cairo opened a 56.5 km monorail in 2026 [S43] and is building Metro Line 4 in phases [S19, S20]. Lagos has two lines in service [S32, S33], Abidjan is building a 37 km elevated metro [S35] and Dakar is extending its TER [S36]. Urban systems are compact, visible and politically important, which makes them attractive for operations and maintenance contracts.

SECTION 5

Masterplans and expansion plans

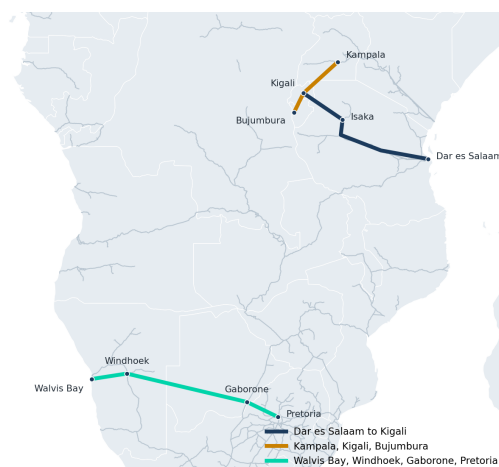
The continental vision, and the national plans that are turning parts of it into track.

5.1 The African Integrated High-Speed Railway Network

The African Union endorsed the African Integrated High-Speed Railway Network in 2013 as a flagship project of Agenda 2063 [S3]. It aims to connect the 16 landlocked countries to seaports, link regions and capitals, and establish interoperability across the continent [S3]. The first objectives, to be achieved by 2033, are interconnecting landlocked countries, connecting regions and establishing trans-Africa beltways [S3]. The network foresees at least 12,000 km of new track [S4], and the first phase comprises 13 priority links between two to four countries each [S5].

Three corridors have been identified as pilots for accelerated development: Dar es Salaam to Kigali, combined with Kampala, Kigali and Bujumbura, and Walvis Bay, Windhoek, Gaborone and Pretoria [S3].

Map 4. Pilot corridors of the continental network



Pilot corridors, schematic [S3]. Existing network [S82]. Boundaries [S42]; boundaries shown do not imply any position on their status.

5.2 National plans

Country	Plan	Ref
Algeria	Grow the network from 4,722 km in 2023 to 15,000 km by 2030.	[S25]
Morocco	A high-speed network of 1,100 km under the 2040 rail strategy, reaching Agadir, Fez and Oujda.	[S24]
Egypt	A 2,000 km high-speed network across three lines.	[S18]
Tanzania	A 4,752 km network across the Central, Northern and Southern corridors, with more than 2,100 km under construction.	[S11]
Nigeria	A long-term high-speed line between Lagos and Maiduguri, and light rail for major state capitals.	[S31]
East Africa	A regional standard gauge network linking the Indian Ocean coast with Rwanda, South Sudan and the DRC.	[S13]

SECTION 6

Challenges

The constraints are real. They are also where specialist capability is most valuable.

Challenge	Evidence
Financing and financial close	Announcement and financial close are different events. Kenya has committed about USD 231 million from the exchequer against about USD 3.9 billion needed for its extension [S16]. Uganda is working towards financial close in November 2026 [S13].
Interoperability	Multiple gauges, two main electrification systems and differing standards [S1]. Neighbouring countries are aligning designs across structures, traction power, signalling, communications and rolling stock before building [S46].
Asset condition and security	Equipment shortages, maintenance delays, cable theft and vandalism have undermined reliability on South Africa's network [S29].
Ramp-up to design volumes	New and revived corridors start far below design capacity, as the Lobito figures show [S41].
Network decline	Where maintenance lapsed, networks shrank: Senegal from 1,087 km to 602 km operational [S38], Ghana from 947 km to 160 km [S39].
Skills and local capability	Large programmes create large workforces, more than 30,000 direct jobs on the Tanzanian SGR alone [S11]. Keeping those skills in operations and maintenance is the longer task.

SECTION 7

Key findings and strategic implications

The value is moving from the construction contract to the life of the asset.

Where the opportunity sits

Opportunity	Why now
Availability and maintenance under long concessions	30-year concessions on Lobito and TAZARA put operating risk with the operator, who then buys availability, not just equipment [S6, S8, S9].
Fleets and leasing for new operators	South Africa's open access regime expects operators and leasing companies to invest in rolling stock, with up to R100 bn of new investment [S27, S28].
Support for new standard gauge fleets	Egypt, Morocco and Tanzania are bringing large new electric fleets into service [S10, S18, S22]. Spares, overhaul and depot support follow.
Rehabilitation of legacy networks	Rebuilding lapsed metre and Cape gauge lines and fleets, and upgrading them to feed new standard gauge spines [S12, S57, S62, S64].
Terminals, sidings and first and last mile	Private access to sidings and terminals is opening, as in South Africa's 20 sidings for lease [S55].
Electrification and signalling	With about 15 percent of the network electrified [S1], power supply and modern signalling run through almost every new project.
Urban rail operations and maintenance	New systems in Cairo, Lagos, Abidjan and Dakar need operators, maintainers and fleet support for decades [S19, S32, S35, S36].
Interoperability and cross-border services	Standards alignment, border interchange and cross-border operations along the Northern, Central and Lobito corridors [S13, S40, S46].

Why Africa, why now. The continent has the rare combination of a large inherited network, a live construction cycle and a structural shift towards long-term operators. Suppliers who arrive with a lifecycle offer, priced on availability and backed by local capability, will be talking to buyers who are asking exactly that question.

SOURCES

Sources and methodology

How the evidence was gathered, how each source is tiered, and where it is thinnest.

Method. Desk research of public sources up to 21 September 2026: government and agency statements, operator and project disclosures, official project pages, established industry and news reporting, and reference works. Figures are reported as published. Where sources disagree, the range is shown. Maps are schematic and drawn from public boundary and railway line data. No confidential or client information is used, and no figure is drawn from a licensed database.

Source tiers. Every source in the register carries one of three tiers.

Tier	What it covers	Sources
T1 Primary	Governments and their agencies, operators, concession holders and project owners, multilateral institutions and standards bodies, and public reference datasets.	11
T2 Secondary	Established trade and news reporting, academic work, and market research made public by its publisher or reported in the press.	61
T3 Reference compilation	Open encyclopaedic works and platform publications. Used only for descriptive facts such as route length and system inventory, never for market sizing.	19

Where the evidence is thinnest. The urban rail inventory in Section 3.5 rests largely on T3 compilations, and its route lengths should be treated as indicative. The Lobito throughput figures in Sections 4.1 and 6, a 240,000 tonne copper target against a 4.6 million tonne design capacity, come from a T3 platform publication [S41] and should be confirmed against the concessionaire's own disclosure before use.

Source register

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Revisions. This study is updated as the market moves. Each revision carries a note of what changed.

ABOUT THIS STUDY

KhahanA Insights

KhahanA Insights is a Dubai-based strategic management and business consultancy working across three areas: management and business consultancy, Agentic Intelligence business solutions, and market entry strategy across the Middle East and Africa.

This study sets out the firm's reading of the African rail market as of September 2026: the network in place, the projects under way, and where the opportunity sits for suppliers of infrastructure, rolling stock, and operations and maintenance.

Talk to us. For a briefing on a specific country, corridor or segment, or to discuss market entry into African rail, write to info@khahana.com or describe what you need at khahana.com/start.