

Unlocking Opportunities

A Swedish
Perspective on Key
Sectors in Uganda

Foreword

In today's dynamic market, opportunities for growth and collaboration are constantly evolving.

This report aims to provide Swedish companies, investors, and business leaders with key insights into Uganda's vibrant economy, highlighting sectors ripe for investment and collaboration, and the strategic potential for success in the region.

Sweden and Uganda enjoy a deep and longstanding relationship. Sweden's development cooperation with Uganda dates to the late 1980s. Today the partnership between Uganda and Sweden is vibrant, impactful and forward-looking. Sweden will continue to contribute to Uganda's journey from poverty to economic growth and prosperity in important areas such as improving health for the most vulnerable, increasing resilience to climate change, promoting democracy and good governance, and strengthening sustainable trade that contributes to job creation. At the same time, Sweden is convinced that lifting people out of poverty requires closer cooperation between development assistance and trade, greater mobilisation of private capital and harnessing the business sector's innovation capacity.

Swedish companies offer cutting-edge technologies and solutions necessary for the global green and digital transition. Team Sweden, comprising the Swedish Embassy, Business Sweden, the Swedish Export Credit Agency (EKN), the Swedish Export Credit Corporation (SEK) and Swedfund, plays a crucial role in strengthening economic ties and ensuring Swedish businesses thrive in Uganda's growing economy by facilitating partnerships, providing market intelligence, and engaging in strategic initiatives.

This report presents an exploration of the Ugandan market, offering key insights into its economic opportunities, sectoral growth, and the collaborative efforts between Sweden and Uganda. Whether you are exploring Uganda for the first time or already involved in its market, we hope that you will find this report a vital tool for informed decision-making.



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Contents

Foreword	2
Introduction	5
Overview & regional aspects	5
Economic outlook & key drivers of growth	5
Uganda's governments development policy priorities	6
Strategic Objectives of the NDP IV	6
Essential Fundamentals for Investing in Uganda	7
Key Sector Analysis	8
Healthcare	8
Energy	11
Transport	16
Agriculture	19
Annex 1	22
Development Cooperation	22
Annex 2	23
Team Sweden	23

Executive Summary

Uganda is emerging as one of East Africa's most dynamic economies, marked by demographic growth, expanding infrastructure, and increasing regional influence.

With a population exceeding 47 million - over 75% under the age of 30 - Uganda offers both significant development challenges and untapped opportunities for sustainable investment. This report explores key sectors - healthcare, energy, transport, and agriculture - and identifies areas where Sweden's capabilities and values align with Uganda's national development goals.

Uganda's Fourth National Development Plan (NDP IV) aims to double GDP by 2030 by focusing on value addition, industrialisation, and human capital development. The government is also prioritising inclusive growth, climate resilience, and improved service delivery. These ambitions open pathways for foreign investment, technology partnerships, and knowledge exchange - especially in sectors that underpin economic transformation.

In healthcare, demographic pressures, rising demand for specialised services, and a push for digitalisation present growing opportunities for Swedish companies in medtech, telemedicine, and digital health infrastructure. Uganda's commitment to expanding cancer care and establishing universal health coverage by 2031, amidst a sharp decline in development financing, signals further need for innovative and cost-effective solutions.

The energy sector is undergoing major reform as Uganda aims for universal electricity access by 2040. With recent investments in hydro, solar, and regional power integration, opportunities abound in smart grids, battery storage, and off-grid electrification - areas where Sweden

has a proven track record with strong and technical advanced energy solutions. Existing bilateral cooperation, including an MoU signed in 2019, has already paved the way for joint projects and institutional development.

Uganda's transport sector is in the midst of transformation. The planned Standard Gauge Railway (SGR), upgrades of the existing metre-gauge rail, and new urban mobility initiatives such as electric buses and BRT systems reflect a national commitment to modernise infrastructure. These initiatives align well with Swedish expertise in sustainable transport, electrification, and digital mobility systems.

In agriculture, Uganda's shift from subsistence to commercial farming is reshaping the sector. Swedish companies can support this transformation through climate-smart technologies, agribusiness finance, cold chain logistics, and value-added processing - especially in high-potential sectors like dairy, coffee, and forestry. As Uganda strengthens regulation and market linkages, the demand for innovation, digital services, and sustainable practices will continue to grow.

This report also highlights cross-cutting challenges - such as infrastructure gaps, limited access to finance, and regulatory inefficiencies - that Swedish companies must navigate. Nonetheless, Uganda's openness to collaboration, coupled with Sweden's strengths in innovation, sustainability, and public-private partnership, creates a fertile ground for strategic engagement.

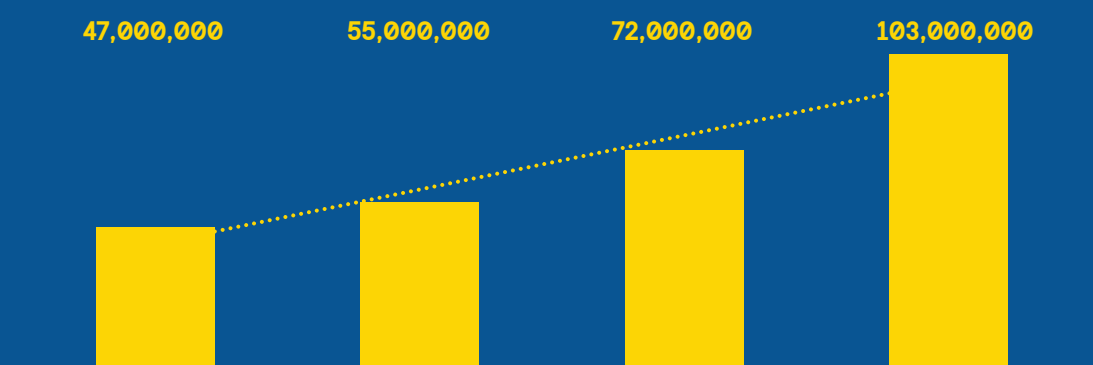
Introduction

Overview and regional aspects

Uganda, officially the Republic of Uganda, is located in East Africa and is bordered by South Sudan, Kenya, Tanzania, Rwanda, and the Democratic Republic of the Congo (DRC). The country is landlocked but benefits from access to significant lakes and rivers, including Lake Victoria, Africa's largest freshwater lake, also known as the source of the river Nile. Uganda's strategic location at the heart of East Africa positions it as a potential hub for regional trade and integration.

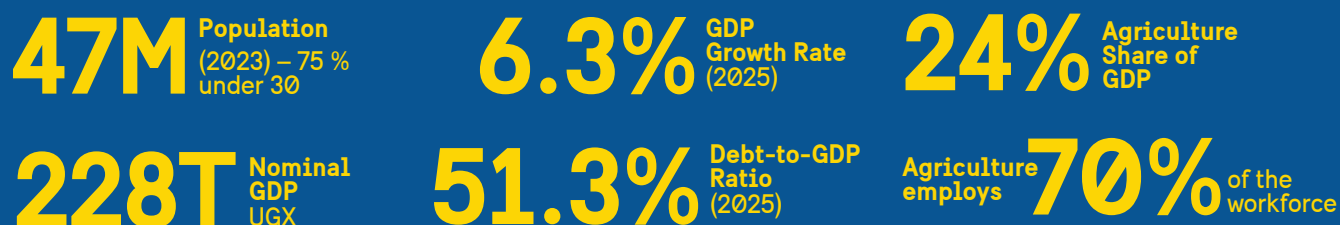
Historically, Uganda was a British protectorate until gaining independence in 1962. Since then, the country has experienced periods of political turbulence, culminating with the regime of Idi Amin in the 1970s. However, Uganda has made significant strides in stabilizing its governance and economy under the leadership of President Yoweri Museveni, who has been in power since 1986.

Uganda's Population Growth Trajectory (2021-2050)



Uganda ranks 31st globally in population, with an estimated 47 million people, 75% of whom are youth. Only 49% of the population has completed primary school education while 11% completed post-Secondary education. Per capita income stands at \$1,000 as per the latest national statistics, up from \$650 in 2015 and \$500 in 2010. With a population growth rate of 3.6% in 2021, Uganda has one of the fastest-growing populations in the world. By 2050, its population is projected to more than double, underscoring its immense demographic potential. This youthful population presents both opportunities and challenges, particularly in terms of education, employment, and service provision.

Economic outlook & key drivers of growth



Uganda is one of the fastest-growing economies in East Africa, with GDP growth supported by agriculture, services, and increasing contributions from the industrial sector. Agriculture remains the backbone of Uganda's economy, employing nearly 70% of the workforce, most of whom operate within the informal sector. The sector accounts for about 24% of GDP and plays a vital role in food security, employment, and exports. While unemployment rates are relatively low at 8.6%, underemployment and informal work dominate the labour market.

The government is focused on diversifying the economy through investments in industrialisation, tourism, and the emerging oil and gas sector. Discoveries of oil reserves in the Albertine region have positioned Uganda as a future player in the global energy market. Projects like the East African Crude Oil Pipeline (EACOP) are expected to contribute significantly to economic transformation, with oil production anticipated to begin in 2026. The industrial and services sectors, combined with trade and tourism, are becoming increasingly important drivers of growth.

Uganda's GDP growth rate stood at 6.3% in 2025, according to official statistics, with a nominal GDP of UGX 228 trillion. The Uganda central bank attributes this to significant growth in agricultural and industrial production as well as strong aggregate demand. The World Bank reports that this growth was driven by recovering household consumption, a surge in public spending,

robust investment growth and rising coffee exports. The central bank projects a 6.0–6.5% growth in 2026 underpinned by prudent monetary policy, rising agricultural input and increased investment in extractives. The World Bank projects that growth will remain steady in 2026 but accelerate in 2027 as oil production begins. The government's fiscal policies have helped stabilise the Ugandan Shilling since 2017 and have kept core and headline inflation under 5%. The central bank projects core inflation to average between 4.5–5.0% in 2026. The debt-to-GDP ratio stood at 51.3% in 2025 according to official statistics, which, though falling within regional convergence thresholds of 50%, underscored the need for prudent fiscal management. However, some analysts note that debt-related costs are expected to consume a growing share of the national budget, which could constrain fiscal space and limit resources for development priorities. By investing in critical sectors such as energy, transport, and education, while also identifying emerging industries for future investment, the government is prioritising long-term economic growth and enhancing regional competitiveness.

Despite these positive trends, Uganda faces structural challenges, including wealth inequality, infrastructure gaps, and regional security concerns. Political continuity under President Museveni provides short-term stability, but questions around succession pose longer-term risks to the investment climate.

Uganda's government development policy priorities

Uganda's previous three National Development Plans (NDPs) set the direction for long-term growth through investments in infrastructure and human capital. The Fourth National Development Plan (NDP IV) builds on this by aiming to deliver tenfold economic growth and double the country's GDP by 2030. The plan focuses on achieving higher household incomes, employment creation, sustainable socio-economic transformation, and monetization of the economy. It will be primarily financed by the Government of Uganda, contributing 69.6% of the resources, while the private sector is expected to contribute 30.4%.

The Development Plan outlines 18 programmes grouped under four thematic clusters: Production and Value Addition, Social Development, Enablers, and Governance. The Production and Value Addition cluster focuses on agro-industrialisation, sustainable extractives, tourism development, private sector growth, and manufacturing, all aimed at increasing value addition, competitiveness, and market access. The Enablers cluster includes sustainable management of natural resources, transport, energy, digital transformation, and innovation to support broader development. The Social Development cluster targets human capital, sustainable urbanization, and balanced regional development through improved service delivery, education, health, and social protection. Finally, the Governance cluster emphasizes public sector transformation, security, justice, legislation, and effective implementation of the Development Plan to ensure transparency, efficiency, and inclusive development.

Strategic Objectives of the NDP IV



Sustainably increase production, productivity and value addition in agriculture, industry, minerals, oil & gas, tourism, ICT and financial services.



Enhance human capital development along the entire life cycle.



Support the private sector to drive growth and create jobs.



Build and maintain strategic sustainable infrastructure in transport, housing, energy, water, industry and ICT.



Strengthen good governance, security, and the role of the State in development.

Essential Fundamentals for Investing in Uganda

The Government of Uganda has traditionally focused on key sectors for investment, including agriculture, agro-processing, manufacturing, tourism, hospitality health care and education. There is also special emphasis on public infrastructure and energy, due to Uganda's infrastructural challenges and the expected growth from the country's oil production.

The Regulatory Environment

- **Incorporation** - Company registration is regulated by the Companies Act 2012 and conducted with the Uganda Registration Services Bureau, usually completing within a week.
- **Obtaining an Investment License** - The Investment Code Act (Cap. 74) directs foreign investors to apply for an investment license from the Uganda Investment Authority (UIA) alongside documented proof of a minimum balance of USD 250,000 as capital investment.
- **Tax and licensing requirements** - Foreign investors conducting business in Uganda are obliged to register with Uganda Revenue Authority (URA) to enable them to process their tax obligations. Foreign investors should also apply for a trading license from the respective local government authority in their jurisdiction.

Depending on the business category, foreign investors may need to secure secondary licenses attendant to specific sectors, as advised by the Uganda Investment Authority (UIA).

Challenges

Investing in Uganda presents challenges which, while not insurmountable, need to be placed in consideration by entities seeking to invest.

- **Corruption** - Uganda ranks 151 of 180 countries on Transparency International's latest Corruption Perceptions Index. Official reports indicate corruption continues to occur in the judiciary, public procurement and in law enforcement operations, among others. The government is aware of the potential of reports of corruption turning away investment and the President has instituted the State House Investors Protection Unit, which seeks to protect investors from acts of fraud and corruption.
- **Unreliable Electricity** - Although Uganda's electricity peak demand falls short of its installed nearly 2GW capacity, the country's less than optimal electricity distribution infrastructure leads to occasional electricity outages that affect production as well as large swathes of the country that are yet to get connected to the national grid. The government of Uganda continues to support investment in its electricity generation and distribution to fuel production and reduce loss.
- **Limited Public Transport** - Uganda has insufficient mass public transport systems, which lead to congestion and reduced efficiency through longer-than-ideal travel times. Most commutes for both goods and passengers are by road, with more than 66% of the total road network unpaved. This increases freight costs and leads to delays in production and access to markets. The Government's plans to revamp the meter-gauge railway and launch the standard gauge railway should go a long way in alleviating this problem.
- **Slow Administrative Processes** - Investors have regularly raised concerns about slow-administrative processes within regulatory institutions, which cause delays and raise operational costs. In this regard, the UIA established the One-Stop-Centre to create a physical and online access point for Investment licensing, facilitation, and provision of investment aftercare services. The centre offers the following investment facilitation services, among others:
 - a) Investment Licensing, Facilitation, & Aftercare Services.
 - b) Business and company registration services;
 - c) Tax registration, advisory services and Incentives;
 - d) Lands Registry verification services;
 - e) Products and Services standards and quality certification;
 - f) Environmental and Social Impact Assessments (ESIAs/ ESG compliance);
 - g) Immigration services – processing and issuance of work permits and passes
 - h) Trading Licenses
 - i) Processing and provision of Industrial Power and Water services
 - j) Tourism Licensing Services
 - k) Capital Markets regulatory compliance.
- **Complicated Land Acquisition Processes** - Uganda's land management system is complicated and occasionally causes delays in commencement of large public infrastructure projects. The law requires private landowners to agree to compensation amounts before the government can take land for public projects. When private individuals contest the compensation sum, lengthy disputes can halt project implementation for extended periods.



Healthcare

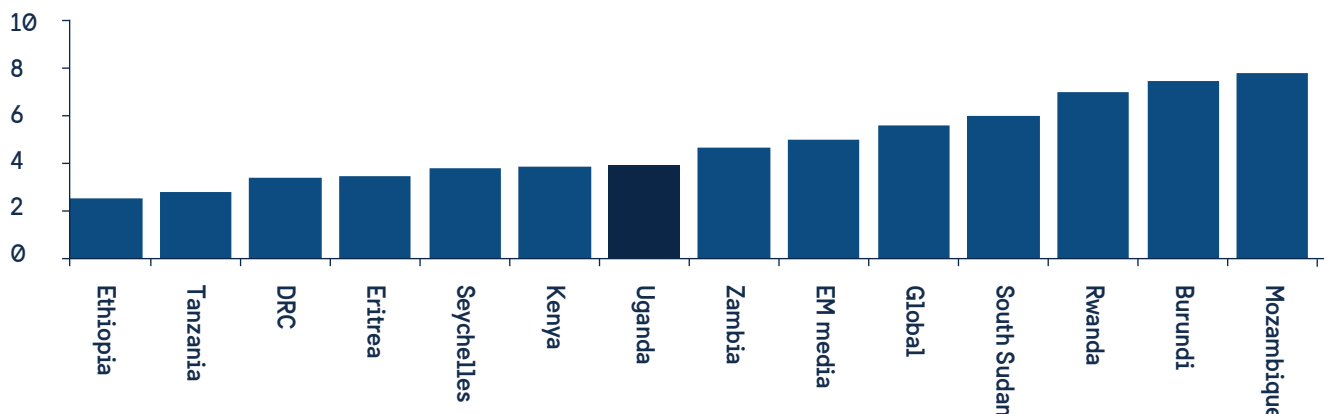
Market Overview

Uganda's healthcare system is mixed, comprising public, private not-for-profit (PNFP), and private for-profit (PFP) providers. It remains highly fragmented, particularly in financing, with limited cross-subsidisation. Public healthcare provision is insufficient, with public health expenditure accounting for just 30% of the total, while households and development partners - before the departure of USAID - contributed to the remaining 70% of financing. Uganda ranks as the 13th largest healthcare market (BMI Fitch Solutions – Healthcare Report Uganda) in Sub-Saharan Africa but lags significantly behind in terms of infrastructure and service delivery.

The current hospital bed ratio stands at 0.7 beds per 1,000 people, and while staffing levels are improving slowly, physician and nurse shortages continue to constrain service quality and access. These challenges are compounded in rural areas, where access to quality care is limited and healthcare infrastructure is often under-resourced. Although a National Health Insurance Scheme was passed by parliament in 2021, it has not yet been enacted, delaying broader reforms intended to improve access and reduce out-of-pocket costs. The government has set a target of universal coverage by 2031.

Health Expenditure As A Percentage Of GDP (2023)

Source: Worldbank



Despite existing constraints, growth prospects remain positive, although forecasts may need to be revised considering reduced donor funding from key partners such as USAID. While total health expenditure was previously expected to increase at a CAGR of 15% through 2028, this

projection will increasingly depend on domestic resource mobilisation, private sector participation, demographic growth, and urbanisation, rather than continued donor involvement. However, per capita health spending remains extremely low compared to regional and global medians, limiting demand for advanced care products and technologies.

Key Trends and Challenges

Uganda is at a critical juncture where health policy ambition is high, but delivery is constrained by systemic weaknesses. A growing population - predominantly young, but with a slowly rising share of elderly - continues to strain the already limited infrastructure. Maternal and neonatal mortality rates remain high, and many essential services such as prescription drugs, eye care, and diagnostics are either partially or not at all covered in public healthcare facilities. Furthermore, the closure of USAID has led to a dramatic downfall in the external financing for the sector. The digital health strategy adopted for 2020–2025 outlines ambitious goals, including the introduction of electronic medical records (EMRs), strengthened data systems, and the wider use of telemedicine. However, many healthcare facilities, particularly public hospitals, still lack the basic IT infrastructure required to support digital innovation.

Despite these limitations, interest in digital health solutions is growing, both among public institutions and private innovators. There is also significant activity around data-driven health systems, with platforms such as Uganda's computerised Logistics Management Information System and Warehouse Management System supporting supply chain and planning functions.

Uganda is also expanding access to specialised care, particularly cancer services, in response to the rising burden of non-communicable diseases. While the Uganda Cancer Institute in Kampala has long served as the national referral centre, new regional cancer centres have been established in Mbarara, Gulu, and Mbale to improve accessibility. These efforts mark a critical shift toward decentralised oncology care, though challenges remain around funding, infrastructure, and personnel to ensure sustainable service delivery.

Regional Cancer Care centres in Mbarara (top) and Gulu (bottom)



Photo: unknown



Photo: Joseph Omagor

Key Players

- **Ministry of Health:** Government body responsible for leadership, policy direction, and regulation of Uganda's healthcare sector.
- **Uganda Healthcare Federation:** National organization advocating for the interests of the private sector in healthcare.
- **Uganda National Association of Private Hospitals (UNAPH):** Represents private hospitals and clinics in Uganda, supporting policy dialogue and sector development.
- **National Drug Authority (NDA):** Regulatory agency ensuring the quality and safety of medicines and medical supplies.
- **National Medical Stores (NMS):** Government agency responsible for procuring, storing, and distributing essential medicines and medical supplies to public health facilities.
- **Aga Khan:** Private healthcare institution in East Africa, providing specialized care and medical training.
- **International Hospital Kampala:** Uganda's largest private hospital, offering specialized medical services and high-quality patient care.
- **Makerere University School of Medicine:** A leading institution for medical education and research in Uganda.
- **Medical Access Uganda Limited (MAUL):** Specializes in the procurement, distribution, and supply chain management of essential medicines.

Business Opportunities

Uganda's healthcare sector presents strategic opportunities for Swedish firms, particularly those with capabilities in digital health, medical technologies, and infrastructure connectivity. The need for integrated, scalable solutions that can reach rural and underserved populations is especially acute.

There is strong potential for Sweden to contribute to Uganda's digital health transformation, especially through cloud-based hospital management systems, secure electronic health records, and telemedicine platforms that are optimised for low-bandwidth environments. While Uganda's mobile and internet penetration remains low, this challenge also creates an opening for companies offering integrated solutions that combine healthcare technology with connectivity infrastructure - a space where

Swedish expertise in mobile networks, digital inclusion, and secure data transmission can offer distinct value.

Uganda's reliance on imported medical equipment creates a clear entry point for Swedish medtech suppliers, particularly in diagnostics, intensive care, maternal health technologies, and increasingly, cancer care. The recent expansion of regional cancer centres has increased demand for diagnostic imaging, radiotherapy, oncology information systems, and clinical training. Both public and private providers are seeking reliable, durable, and cost-effective solutions that can function in low-resource settings. Swedish companies - with proven strengths in medtech and digital health - are well positioned to support Uganda's efforts to strengthen specialised care and build resilient healthcare infrastructure.

The push to localise pharmaceutical production - motivated by frequent stock-outs and reliance on imports - could also open the door for technology partnerships, especially in quality control systems, formulation technology, and packaging solutions. Finally, there is growing donor and government interest in climate-smart and resilient healthcare systems, which links to Sweden's leadership in sustainable innovation. From energy-efficient medical devices to off-grid diagnostic solutions, Swedish firms are well-placed to align with Uganda's broader development agenda and Sustainable Development Goals.

Regulatory environment.

The government of Uganda has put in place incentives for investment in the health sector, including VAT and import duty exemption for such medical equipment as cardio graphic machines, ultra sound machinery, dental drill equipment, ophthalmic instruments, X-ray machines, and medical autoclaves. Uganda's healthcare sector is guided by a broad and ambitious set of policies, but implementation remains uneven. Several national strategies lay out the direction for reform, including the Ministry of Health Strategic Plan (2020 – 2025), the National Medical Countermeasures Plan (2023 – 2028), and the National Pharmaceutical Services Strategic Plan (2020/21 – 2024/25). Together, these documents articulate a vision for improved access, emergency preparedness, and stronger domestic pharmaceutical capabilities. However, gaps between policy and execution are evident across many areas.

A critical bottleneck is the stalled National Health Insurance Scheme (NHIS). Though passed by Parliament in 2021, the bill was denied presidential assent and remains under review. The lack of a functioning national insurance framework leaves Uganda with one of the highest shares of out-of-pocket spending in the region. This limits both access to care and the financial predictability needed for providers to scale.

For Swedish companies, navigating Uganda's regulatory environment will require an understanding of both the formal policy frameworks and the realities of operational fragmentation. While the direction of reform is clear - toward more digitalisation, improved regulation, and broader coverage - the pace of change is gradual. Companies entering the market will benefit from flexible models, strong local partnerships, and a long-term perspective aligned with Uganda's health sector development agenda.

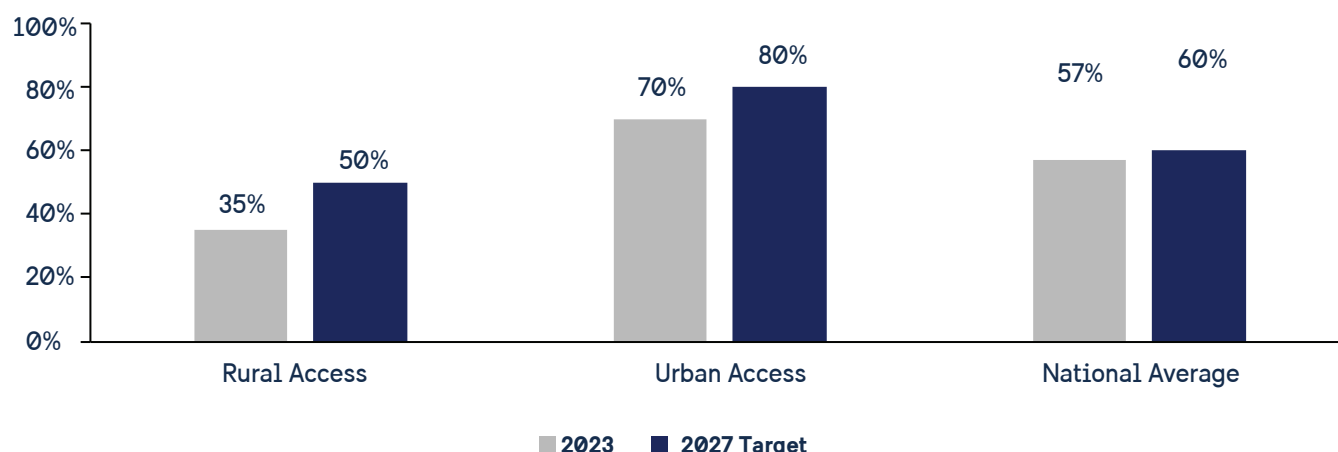


Energy

Market Overview

Uganda's energy sector has undergone a significant period of development and reform in the last two decades, driven by a national commitment to achieving universal access to electricity by 2040. As of 2023, only about 51.5% of Uganda's population had access to electricity, with rural access estimated below 40%. Although Uganda has increased its installed electricity generation capacity to over 2,000 MW, mainly from hydropower, which accounted for 86.2% of generation in 2022, with biofuels contributing 8.7% and oil 2.6%, effective consumption remains low due to transmission losses, affordability issues and grid constraints.

Electrification progress and targets by 2027



In urban areas, electrification now exceeds 70%, while rural access has climbed to 35% thanks to expanding mini-grid systems, off-grid solar solutions, and government-led subsidy programs under the Electricity Connections Policy (2018 – 2027). The government, through the Uganda Electricity Transmission Company Limited (UETCL) is investing in extending grid coverage, modernising transmission lines, and facilitating regional interconnectivity. Uganda's Vision 2040 and the fourth National Development Plan (NDPIV) prioritize industrialization, private sector development and inclusive access to clean and modern energy. Vision 2040 states that to achieve the 2040 targets, Uganda will require an electricity system capable of 41,738 MW by 2040, 80% national grid access, and 3,668 kWh per capita, with an indicative capacity mix of 4,500 MW hydropower, 5,000 MW solar, 1,500 MW geothermal, 1,700 MW biomass, alongside 24,000 MW nuclear, 800 MW peat and 4,300 MW oil. NDPIV (2025/2026–2029/2030) operationalizes these ambitions by increasing electricity access from above 50% to 70%, electricity generation capacity from 2,047MW to 15,420MW, per capita electricity consumption from 218kWh/a in FY2023/2024 to 1,090 kWh/a, among others.

Uganda's industrial sector is central to national strategies such as Vision 2040 and NDPIV. Over the past two decades, manufacturing's share of GDP has risen from around 6% to nearly 9%, driven by growth in agro-processing, construction materials, steel, and light manufacturing. Industrialization is expected to accelerate under NDPIV as new industrial parks and value-addition facilities are developed.

The sector now accounts for over 25% of national electricity demand (ERA, 2023), and demand is projected to grow by 8–12% annually as industrial activity expands. However, high energy costs, inefficient technologies, and unreliable grid supply continue to constrain competitiveness. Many firms – particularly SMEs – still rely on biomass and diesel generators, especially in areas with weak grid infrastructure.

These challenges present opportunities for collaboration and investment, especially for Swedish firms with expertise in energy efficiency, clean production technologies, smart grids, and renewable integration. Improving industrial energy performance will be crucial for achieving Uganda's Vision 2040 targets and enhancing the sector's long-term sustainability.

Uganda has introduced several policy initiatives to promote energy, including the Energy Policy for Uganda 2023 and the draft Energy Efficiency and Conservation Bill. The Energy Policy for Uganda (2023) sets a headline target to cut Uganda's energy intensity by more than half, from 9.97 MJ per 2017 USD GDP to 3.70 MJ per 2017 by 2040, and commits to a cross-cutting package of Minimum Energy Performance Standards (MEPS) and labelling, energy audits and certification, sectoral data collection, awareness/capacity-building, efficient cooling and an e-mobility legal framework.

Key trends and Challenges

One of the most promising developments in Uganda's energy sector is the government's increasing focus on energy diversification and climate resilience. With hydropower vulnerable to seasonal fluctuations, Uganda is accelerating investments in alternative sources. The Energy Transition Plan (ETP) launched in 2023 sets out a clear roadmap for shifting toward a more balanced energy mix, including plans to add over 250 MW of solar capacity by 2033. Public-private partnerships are already supporting utility-scale solar projects and battery storage pilots, and the regulatory framework is gradually adapting to facilitate private sector participation in renewables.



In parallel, significant infrastructure upgrades are underway. Multiple new transmission projects have been approved, aimed at unlocking underutilised generation capacity and improving reliability. These include the Nkenda–Hoima, Kawanda–Masaka, and Karuma–Kawanda lines, as well as regional interconnectors with Rwanda, Kenya, South Sudan and the DRC under the Eastern Africa Power Pool framework. These projects not only aim to reduce technical losses and outages but also support Uganda's position as a net power exporter in the region.

Off-grid electrification is another area of rapid growth. The Electricity Access Scale-Up Project (EASP), co-financed by the World Bank and the Government of Uganda, is supporting the deployment of solar home systems, mini-grids, and productive-use applications across rural districts. This program is complemented by donor-backed initiatives that de-risk private investments and promote inclusive energy access, including for health centres and schools.

While challenges remain around cost-reflective tariffs, operational inefficiencies, and regulatory capacity, the overall direction of reform is positive. The Electricity Regulatory Authority (ERA) continues to strengthen transparency and investor engagement, and Uganda's power sector governance has been commended for its stability relative to the region.

Key Players

- **Ministry of Energy and Mineral Development:** Provides policy guidance and creates an enabling environment for the development and exploitation of energy, mineral, oil, and gas resources.
- **Uganda Electricity Transmission Company Ltd:** Purchases electricity in bulk from generating companies and sells to distribution companies.
- **Uganda Electricity Generation Company:** Operates and maintains generation stations.
- **Uganda Electricity Distribution Company Limited (UEDCL):** State-owned utility, assumed full responsibility for distribution (≤ 33 kV) nationwide on 1 April 2025. Focuses on operational efficiency, grid expansion, and improved service delivery under Uganda's energy reforms. Until March 2025, the company Umeme held the electricity distribution concession. Assets and operations have been transferred back to government.
- **Electricity Regulatory Authority** a government agency that regulates, licenses, and supervises the generation, transmission, distribution, sale, export, and importation of electrical energy in Uganda.
- **Uganda Investment Authority:** Promotes and facilitates investment in Uganda by providing the government with guidance on policies that foster a favorable investment climate.
- **UNREEEA (Uganda National Renewable Energy and Energy Efficiency Alliance):** A non-profit organization supporting and representing private sector associations to drive growth and improve the business environment in the renewable energy and energy efficiency sectors.
- **USEA (Uganda Solar Energy Association):** A non-profit association that facilitates the growth and development of solar energy businesses in Uganda and East Africa.
- **Private Sector Foundation Uganda (PSFU):** Supports private sector growth through advocacy and capacity building, serving as the government's implementation partner for select projects to enhance the sector.
- **Uganda Energy Credit Capitalization Company:** Provides financial, technical, and other support for renewable energy infrastructure development projects.

Business opportunities for Swedish companies

Uganda's evolving energy landscape presents compelling opportunities for Swedish companies with expertise in sustainable energy systems, digitalised infrastructure, and off-grid solutions. As the country pushes toward universal access to electricity and a more diversified energy mix, Swedish actors are well positioned to contribute with innovative technologies, long-term partnerships, and impact-driven models.

The foundation for commercial engagement is strengthened by an established track record of bilateral collaboration. In 2019, Sweden and Uganda signed a Memorandum of Understanding (MoU) aimed at enhancing Uganda's energy infrastructure – particularly in the areas of renewable energy, energy efficiency, and electricity distribution. Since then, the partnership has facilitated a range of technical and institutional projects, demonstrating Sweden's long-standing commitment to Uganda's energy development. The MoU was extended in 2022, and then again in 2025, for a period of three years until June 2028. The Amendment to extend the MoU was signed by Dr. Ruth Nankabirwa Ssentamu, Minister for Energy and Mineral Development, and Ambassador Maria Håkansson.

This is as an important signal of the continued commitment from the Ugandan government to collaborate with Sweden in the Energy sector.



Key initiatives under this collaboration include feasibility studies and capacity building for floating solar installations – an innovative solution aimed at increasing solar generation without competing for land use. Through Swedfund and other channels, Sweden has supported preparatory work for

floating solar projects on hydropower reservoirs, a promising complement to Uganda's hydro-based energy system.

Infrastructure upgrades have also been a focus area, including the deployment of SCADA systems at the Uganda Electricity Transmission Company Limited (UETCL) and the installation of over 1,000 low-voltage feeder pillars to reduce technical losses and improve distribution reliability.

Human capital development has been another critical pillar. Swedish-supported training programs for staff at Ugandan utilities have helped build local capacity in operations, engineering, and system planning. In the financing domain, Swedish support through instruments like the Beyond the Grid Fund for Africa and the Swedish Renewable Energy Guarantee (with Stanbic Bank Uganda) has contributed to de-risking investments in off-grid and mini-grid energy solutions, helping local developers reach more underserved communities.

Building on this foundation, several future-facing opportunities align closely with Sweden's strengths. The modernisation of Uganda's transmission and distribution systems continues to be a national priority. Swedish firms offering smart grid solutions, energy management systems, and advanced metering technologies can support efforts to reduce technical losses and optimise electricity delivery.

Off-grid electrification, particularly for rural communities and social infrastructure, remains a key area of expansion. Swedish companies with expertise in solar generation, hybrid systems, and battery storage are well suited to contribute to mini-grid deployments, productive-use applications, and resilient power systems for clinics, schools, and small enterprises.

Moreover, Uganda's energy transition and growing emphasis on climate resilience create space for collaboration in low-carbon technologies, circular energy systems, and sustainable utility planning. With deep experience in system-level innovation, Swedish firms and institutions can offer advisory services, feasibility studies, and knowledge partnerships that support Uganda's long-term energy goals.

Sweden's combined experience in public-private collaboration, technical innovation, and development financing gives its companies a distinct edge in contributing to Uganda's energy transformation. With continued alignment to national priorities and a focus on scalable, inclusive solutions, Swedish actors can help shape a resilient and sustainable energy future in Uganda.

Regulatory and operational environment

Uganda's energy sector is governed by a relatively stable regulatory framework, led by the Electricity Regulatory Authority (ERA), which oversees licensing, tariffs, and quality standards. The sector has been liberalised since the Electricity Act of 1999, allowing private participation alongside key public institutions such as the Ministry of Energy and Mineral Development and Uganda Electricity Transmission Company Limited (UETCL). Policy tools like the Electricity Connections Policy and the Energy Transition Plan provide a clear roadmap for expanding access, supporting renewable energy, and encouraging grid modernisation.

Recent reforms – most notably the consolidation of Uganda's electricity distribution companies – are reshaping the sector's operational landscape and improving investment prospects. The mergers aim to streamline service delivery, enhance efficiency, and strengthen regulatory oversight, reducing duplication and improving coordination between distribution, transmission, and generation entities. Alongside these institutional changes, investor confidence has been supported by feed-in tariffs, standardised power purchase agreements (PPAs), and improved sector planning mechanisms that have accelerated

renewable energy development. Transmission upgrades, regional interconnection projects, and donor-backed electrification programs are also expanding system capacity. Tariff adjustments remain ongoing to balance affordability with cost recovery, particularly for industrial users and rural consumers.

Sweden has played an active role in strengthening Uganda's regulatory and operational environment. Under the 2019 MoU, Swedish partners have supported SCADA upgrades at UETCL, capacity building for utility staff, and advisory work on energy infrastructure and access programs. This foundation offers Swedish companies a favourable entry point to engage with regulatory bodies and contribute to Uganda's shift toward a more resilient, inclusive, and modern energy system.

Off-grid electrification is another area of rapid growth. The Electricity Access Scale-Up Project (EASP), co-financed by the World Bank and the Government of Uganda, is supporting the deployment of solar home systems, mini-grids, and productive-use applications across rural districts. This program is complemented by donor-backed initiatives that de-risk private investments and promote inclusive energy access, including for health centres and schools.

While challenges remain around cost-reflective tariffs, operational inefficiencies, and regulatory capacity, the overall direction of reform is positive. The Electricity Regulatory Authority (ERA) continues to strengthen transparency and investor engagement, and Uganda's power sector governance has been commended for its stability relative to the region.



Transport

Market Overview

Uganda's transport sector plays a critical role in facilitating domestic trade and regional integration, but it continues to face persistent challenges related to infrastructure quality, efficiency, and connectivity. Roads remain the dominant mode of transport, accounting for over 95% of passenger and freight traffic. However, limited maintenance and poor road conditions, especially in rural areas, lead to high transport costs and delays.

Recognising the strategic importance of efficient transport systems, the Ugandan government is investing heavily in the modernisation and expansion of multimodal transport infrastructure. The most prominent project is the planned construction of the Standard Gauge Railway (SGR), intended to improve rail connectivity with neighbouring Kenya and reduce the cost of freight transport. Moreover, the SGR will also connect Uganda to other important countries such as DRC, South Sudan and Rwanda who all will benefit by getting direct access to the Mombasa port. In addition to the SGR, the rehabilitation and upgrade of the existing metre-gauge railway (MGR) is underway to boost cargo capacity and regional trade volumes.



initiatives such as the Kampala Greater Metropolitan Area Urban Transport Master Plan (2018 - 2043) envision the development of mass transit systems, including bus rapid transit (BRT) corridors and electrification of the public transport fleet. The government, in collaboration with international partners and private sector actors, is actively exploring sustainable urban mobility solutions.

Key Trends and Challenges

Uganda's transport infrastructure is undergoing a significant shift, with increasing focus on railway rehabilitation, urban mobility, and sustainability. The SGR project, while delayed, remains a cornerstone of Uganda's transport ambitions. Once completed, it will significantly enhance the efficiency of cargo transport between Uganda and the Port of Mombasa, facilitate trade, reduce road congestion, and lower logistics costs. Meanwhile, the rehabilitation of the MGR lines, notably the Malaba-Kampala and Tororo-Gulu sections, has gained traction with financial backing from development finance institutions. These efforts reflect a pragmatic approach to balancing long-term infrastructure transformation with shorter-term upgrades.

In urban areas, the government is tackling chronic congestion and pollution through modern transit projects. The promotion of electric buses, led by domestic manufacturer Kiira Motors Corporation, is a promising step toward low-emission urban mobility. Additionally, recent investments in electric motorcycles and battery-swapping infrastructure are gaining momentum, especially in last-mile delivery and motorcycle taxi services.

Still, key challenges persist. Limited financing, land acquisition issues, and institutional coordination bottlenecks have slowed progress on major projects such as the SGR. Moreover, enforcement of road safety regulations and urban planning remains inconsistent. Strengthening coordination between agencies, improving public-private partnership (PPP) frameworks, and enhancing project pipeline transparency will be essential to maintain momentum.



Key Players

- **Ministry of Works & Transport:** Formulates policies, monitors, regulates, and builds capacity in the transport sector.
- **Uganda Railway Corporation (URC):** Oversees the operation of the rail transport system with a focus on rehabilitation and expansion of the rail network.
- **Kampala Capital City Authority:** Manages public transport systems within Kampala, including road infrastructure and urban mobility solutions.

Business opportunities for Swedish companies

Uganda's transport sector transformation presents notable opportunities for Swedish companies, especially those offering solutions in rail systems, electrified transport, smart mobility, and project financing. As the country advances railway rehabilitation and prepares for the SGR rollout, companies with expertise in rolling stock, signalling, and systems integration will find a receptive market. There is also strong potential in modernising station infrastructure, introducing ICT-based maintenance systems, and training programs in railway operations.

Urban mobility is another promising frontier. The government's interest in bus rapid transit and the decarbonization of public transport aligns closely with Sweden's strengths in sustainable transport planning, electric and biogas buses, charging infrastructure, and clean energy solutions. Swedish expertise in battery management systems, e-ticketing, and transport planning tools could support the transition to greener and more efficient public transport systems in urban centres.

Furthermore, Uganda's efforts to decarbonise its transport fleet - from two-wheelers to buses - creates a space for Swedish firms involved in e-mobility, vehicle assembly partnerships, and circular battery economies. Involvement in logistics planning, traffic data platforms, and smart infrastructure development (e.g. ITS systems) can also open doors in both donor-funded and public procurement projects. Finally, Swedish financial institutions and impact investors may find opportunities to co-finance large infrastructure projects through PPPs or blended finance models, supporting Uganda's broader development goals while enabling technology transfer and capacity building.

Regulatory and Operational Environment

Uganda's transport sector operates within a regulatory framework that supports infrastructure modernisation while balancing the growth of its automotive and logistics industries. The government has maintained one of East Africa's most accessible vehicle import policies, allowing used cars up to 15 years old. At the same time, it is actively promoting local vehicle manufacturing, including electric mobility, through tax incentives and policy support for assembly plants and battery technologies.

On the infrastructure side, national transport development is guided by long-term strategies such as the National Transport Master Plan and supported by key institutions like the Ministry of Works and Transport, Uganda National Roads Authority (UNRA), and Uganda Railways Corporation (URC). The Standard Gauge Railway project and upgrades to the metre-gauge network reflect Uganda's intent to boost regional connectivity, reduce logistics costs, and shift freight from road to rail.

The government is also encouraging private sector participation in both urban and intercity transport systems. Public-private partnerships are being leveraged to finance road paving projects and modern transit solutions. Urban authorities such as the Kampala Capital City Authority (KCCA) are piloting bus rapid transit systems and electrified mobility options. Together, these regulatory and operational efforts are laying the groundwork for a more efficient, sustainable, and investor-friendly transport sector.



Agriculture

Market Overview

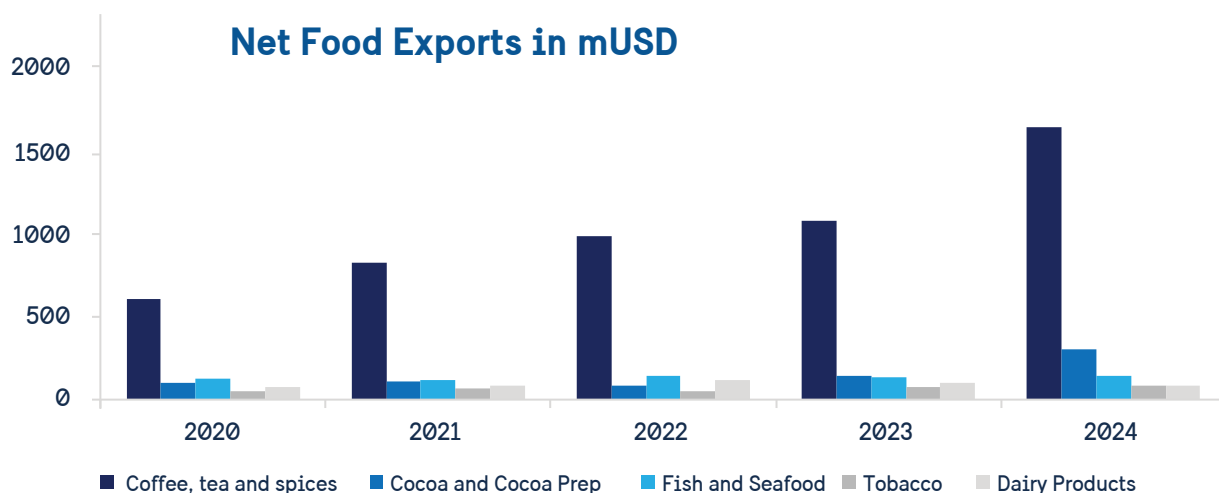
Agriculture remains the backbone of Uganda's economy, contributing over 26% to GDP and employing more than 70% of the population, particularly in rural areas. The sector is characterised by smallholder farming, low productivity, and heavy reliance on rain-fed agriculture. Nonetheless, it plays a central role in food security, rural livelihoods, and export earnings - particularly through coffee, tea, dairy, cotton, and tobacco.



The biggest challenge is value addition in the dairy products industry in Uganda. There is very little innovation in the industry. Hence you don't give consumers a lot of choice

~Jonathan Kinisu,
Managing Director,
Tetra Pak





Coffee is Uganda's leading export crop, with robusta and arabica varieties cultivated across the country.

The sector supports about 1.7 million households and contributes roughly 12% to national export earnings. Government initiatives under the Uganda Coffee Development Authority (UCDA) aim to increase production and value addition through improved seedlings, farmer training, and promotion of domestic coffee consumption. Similar attention is being given to the tea sector, especially in southwestern and eastern Uganda, where both smallholder and estate producers are expanding operations with support from outgrower schemes.

The cotton and tobacco industries also remain relevant. Cotton production, though volatile, is receiving renewed attention under regional textile integration strategies, while tobacco remains a regulated but profitable crop for many farmers in northern Uganda. Uganda's forestry sector, which contributes to both household energy and commercial timber, is under increasing pressure due to deforestation. However, the government is promoting afforestation programs and public-private investment in sustainable forestry management.

Uganda's government has prioritised agricultural modernisation as a pillar for economic transformation. Key areas of focus include value addition, agro-industrialisation, and improved market linkages. The launch of the Parish Development Model and continued investment under the Agricultural Sector Strategic Plan (ASSP III) aim to enhance access to extension services, mechanisation, and inputs such as fertilisers and improved seeds. The National Development Plan (NDP III) also emphasises climate resilience and irrigation expansion.

The dairy sub-sector has emerged as one of Uganda's most dynamic agri-industries. Milk production has grown at a compound annual rate of 10.6%, reaching 3.2 billion litres in 2022, supported by the expansion of milk collection centres and improved transport systems. Currently, Uganda exports about 34% of its processed dairy products, with milk powder, butter oil, and ghee among the top products. However, non-tariff trade barriers in key regional markets, such as Kenya, continue to challenge the sector's growth.

Key Trends and Challenges

Several transformative trends are shaping Uganda's agricultural sector. The shift from subsistence to market-oriented farming is being driven by investments in agro-processing zones, storage infrastructure, and digital platforms for market access. Additionally, increasing integration of ICT solutions - such as e-extension, mobile-based weather forecasts, and digital finance - is improving access to information and services.

The dairy industry showcases this evolution. With over 480 milk collection centres and a network of 329 milk tankers, the country has significantly enhanced its milk logistics. Nonetheless, only around one-third of marketed milk is processed, indicating substantial room for investment in processing facilities and cold chain infrastructure. The sector's export potential remains high, but reliability and traceability systems need further strengthening to meet international standards.

Other export crops, such as tea and coffee, face challenges around fluctuating global prices, quality control, and market access. Climate change and land fragmentation continue to limit productivity, especially among smallholders. The forestry sector, while promising in terms of timber and carbon trading, is hindered by poor regulation and weak enforcement of conservation policies.

Despite its potential, agriculture in Uganda faces systemic challenges. These include limited access to affordable financing, weak land tenure systems, climate variability, and underinvestment in research and development. Infrastructure constraints - particularly in rural transport and electricity - also hinder the competitiveness of agri-value chains.

Key Players

- Ministry of Agriculture, Animal Industry and Fisheries (MAAIF): The government body responsible for agricultural policy, planning, and regulation.
- National Agricultural Research Organization (NARO): Conducts agricultural research and development to improve crop and livestock productivity.
- Uganda National Farmers Federation (UNFFE): Represents and advocates for the interests of smallholder farmers.
- ASARECA: A key player in regional agricultural research and development, collaborating with Ugandan institution

Regulatory and operational environment

Uganda's agricultural sector operates under the policy guidance of the Ministry of Agriculture, Animal Industry and Fisheries (MAAIF), with implementation support from semi-autonomous agencies and district-level agricultural offices. Strategic frameworks such as the National Agricultural Extension Policy and the Uganda National Irrigation Policy provide direction on service delivery, climate adaptation, and commercialisation.

The Government treats development of its agricultural sector as a priority and has created tax and non-tax incentives to attract investment for modernizing agricultural operations and adding value to agricultural products.

Tax incentives include:

- Income tax exemption for production of chemicals intended for agricultural use.
- Exemption from customs duty for seeds for sowing, agricultural inputs, and refrigerated trucks.
- Exemption from withholding tax for agricultural supplies.
- VAT exemption on a variety of agricultural inputs, goods and services.
- Stamp duty exemption on agricultural insurance policies.

Agro-processing incentives are a critical component of Uganda's industrialization and export strategy. The government provides targeted support to firms engaged in processing agricultural produce for both local consumption and export through:

- Income tax holidays of up to 10 years for agro-processing investments.
- Customs duty exemptions on machinery and equipment used in agro-processing.
- Accelerated depreciation allowances for agro-industrial equipment.
- Free-zone and industrial-park benefits, including corporate tax reductions, infrastructure support, and waivers on import duties for raw materials.

In addition, financing mechanisms such as the Agricultural Credit Facility (ACF) and the Support to Agricultural Revitalization and Transformation (START) Facility provide concessional loans and grants for the acquisition of processing and post-harvest handling equipment. These measures align with the National Industrial Policy (NIP) and the Agro-Industrialization Programme (Agro-IP), both of which prioritize value chain development, investment in processing industries, and rural industrial growth. While Uganda ranks relatively well in terms of regional food trade integration, operational challenges persist in logistics, certification processes, and border clearance procedures. Public-private dialogue and coordinated reforms, especially under programs supported by development partners, are important for reducing barriers to entry and supporting sector-wide transformation.

Bilateral Development Cooperation

Sweden and Uganda have built a strong and enduring partnership in development cooperation since the late 1980s. Over the decades, this collaboration has evolved to reflect Uganda's changing priorities and Sweden's commitment to long-term, equitable development.

Building on this solid foundation, the new Strategy for Sweden's Development Cooperation with Uganda 2025–2029, valued at SEK 1.5 billion, marks a continued collaboration and deepened commitment to advancing job creation and trade, democracy, gender equality, sustainable development, and human rights. The strategy aligns with Sweden's broader foreign and development policy goals, reducing poverty and oppression, promoting sustainable livelihoods, and contributing to the objectives of the Paris Agreement. It is also closely aligned with Uganda's own long-term development vision, Vision 2040, and the Fourth National Development Plan (NDP IV).

Sweden will prioritize five key areas during the upcoming strategy period to support Uganda's national ambitions and address remaining development challenges:

- **Strengthening the conditions for productive employment and sustainable trade**
Sweden aims to promote increased productivity, stronger value chains, enhanced market access, and greater innovation. Support will primarily target small and medium-sized enterprises (SMEs), with a particular focus on sectors with high potential for job creation. Priority areas include access to finance, business formalization, the green transition, sustainable energy solutions, and vocational training—with a strong focus on women, youth, and refugees as key target groups.
- **Sustainable management of natural resources and increased resilience to crises and disasters**
Sweden aims to support the sustainable management of natural resources to promote economic growth, improve living conditions for Uganda's poor, and strengthen ecosystem resilience. Particular emphasis will be placed on advancing sustainable energy solution. Sweden will also support efforts to strengthen societal preparedness and response capacity, with a particular focus on climate-related and health-related risks.
- **Strengthening democratic governance with institutions ensuring the rule of law and compliance with human rights**
Sweden aims to support the fight against corruption, promote transparency, and expand access to information by advancing digitalization, strengthening independent media, and supporting initiatives that foster civic and political participation. To protect and promote human rights, Sweden

intends to provide targeted support to vulnerable and marginalized groups by raising awareness of rights, strengthening legal frameworks, and improving access to justice.

- **Human capital development with a focus on health**
Sweden aims to contribute to increased access to quality healthcare and information. A particular focus will be on maternal, child, and youth adolescent health as well as sexual and reproductive health and rights (SRHR) - including sexuality education, knowledge dissemination, and advocacy. This also includes interventions in water, sanitation, and hygiene (WASH) and capacity building within the social sector. Sweden will also support and empower individuals and communities to improve their health and well-being.
- **Improving equality in economic, political and social spheres**
Sweden aims to strengthen women's economic empowerment, uphold their rights, and promote their meaningful participation in all areas of society. Support will also focus on preventing gender-based violence and advancing SRHR. Particular focus will be placed on addressing discriminatory norms, practices, and traditions, as well as on enhancing women's representation and empowerment at all levels. Support will also be directed toward digitalization as a means to improve women's access to markets, legal and social support, information, and education. Sweden engages with a broad range of stakeholders, including civil society organisations, multilateral institutions, academia, the media, and the private sector. By leveraging innovative financing solutions and exploring new forms of partnership, Sweden aims to enhance synergies, particularly at the intersection of trade and development cooperation.

Annex 2

Team Sweden

Team Sweden is a joint way of working and a collaborative platform that strengthens Sweden's trade and investment promotion efforts.

By bringing together government agencies, state-owned companies, regional actors and the private sector, Team Sweden enables a more coordinated, efficient, and business-oriented approach to international promotion.

Swedish Embassy

The Swedish Embassy in Uganda represents the Swedish government and works to strengthen bilateral relations between Uganda and Sweden. Its main areas of work include the diplomatic and political engagement, development cooperation, trade and economic relations and consular services. The embassy is focused on identifying areas where Swedish business solutions can support the growth and diversification of Uganda's economy.

Sida

The Swedish International Development Cooperation Agency (Sida) is a government agency working to create better living conditions for people living in poverty and under oppression around the world. Sida works on behalf of the Swedish government and parliament and the agency's activities are funded through Swedish tax revenue.

EKN

The Swedish Export Credit Agency (EKN) is an authority with the government's mission to promote Swedish exports and the internationalization of Swedish companies, by insuring companies and banks against the risk of non-payment. Decisions are based on a commercial assessment of the investment's risk profile. Regarding private buyers, EKN currently has guarantee commitments in approximately twenty transactions, primarily within the transport, telecommunications, and paper industries. The total commitment, including both offers and guarantees, exceeds SEK 600 million.

SEK

The Swedish Export Credit Corporation is a state-owned company which, on commercial and sustainable terms, finances the Swedish export industry. SEK strengthens the competitiveness of the Swedish export industry and contributes to a more sustainable world, by offering sustainable financing and by setting requirements when lending. Since 1962 SEK has offered loans that have enabled thousands of Swedish companies to grow by increasing their production, completing acquisitions, increasing their employees, and selling goods and services to customers across the globe.

Business Sweden

Business Sweden is Sweden's trade and investment council, working with Team Sweden to promote Swedish businesses globally. The Nairobi office leads efforts in East Africa, supporting companies through strategic advice and stakeholder engagement. This includes market expansion, analysis, sales acceleration, partner searches, and public affairs support.

Swedfund

Swedfund is Sweden's development finance institution and plays a key role in promoting inclusive and sustainable economic growth in Uganda through strategic investments and project support. As part of its broader mandate to reduce poverty through sustainable business, Swedfund supports small and medium-sized enterprises (SMEs), renewable energy initiatives, and financial inclusion in Uganda. Swedfund supports Uganda's ambitions to expand renewable energy generation. Through its Project Accelerator, Swedfund has the flexibility to fund preparatory activities such as feasibility studies, market assessments, and technical due diligence. This mechanism provides an opportunity for Swedish companies to engage early in project development.

NIR

The International Council of Swedish Industry (NIR) is a member-based non-profit organisation which improves business conditions in complex markets by promoting sustainability. NIR's members represent some of Sweden's largest exporting companies and the financial sector. NIR has been operating as a nexus between aid and trade since 1960, interacting with a multitude of stakeholders from governments, agencies and business to academia and NGOs in Sweden and partner countries. In Uganda, NIR has provided critical capacity development on renewable energy to key energy agencies.

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