

Annex 10: Middle East

Trends in the Middle East @2050

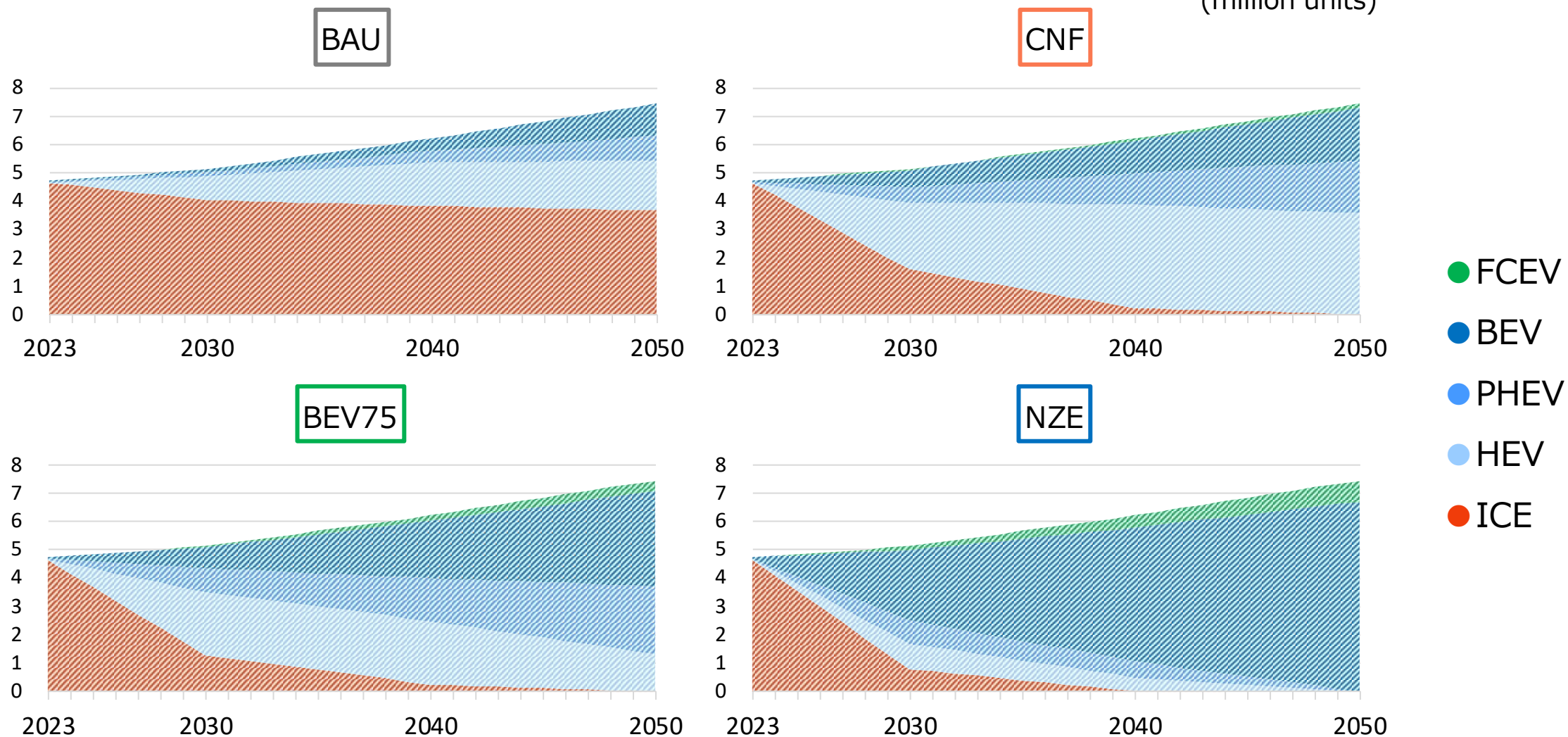
Scenario	Trends in the Middle East		2050/2020 CO ₂ Emissions
All	Market	• For all vehicle types: Significant increases in both new vehicle sales and in-use fleets.	
	Energy mix	• Share of clean energy + CCS is 49%.	
CNF	Electrified vehicles	• Share of electrified vehicles in new vehicle sales: 95% for passenger cars, trucks and buses, with PHEVs accounting for 25% of new passenger car sales, and 80% for motorcycles. • Share of BEVs/FCEVs in in-use vehicle fleets: 23% for passenger cars, trucks and buses and 73% for motorcycles.	-35% (CNF+ -51%)
	Fuel mix	• 47% is CNF (synthetic fuels, biofuels) + electricity + hydrogen. • CNF share represents 27% of total liquid fuel consumption in 2023 (CNF+ 45%).	
BEV75	Electrified vehicles	• Share of BEVs/FCEVs in new vehicle sales: 54% for passenger cars, trucks and buses and 88% for motorcycles. • Share of BEVs/FCEVs in in-use vehicle fleets: 42% for passenger cars, trucks and buses and 81% for motorcycles.	-44%
	Fuel mix	• 61% is CNF (synthetic fuels, biofuels) + electricity + hydrogen. • CNF share represents 19% of total liquid fuel consumption in 2023.	
NZE	Electrified vehicles	• Share of BEVs/FCEVs in new vehicle sales: 100% for all vehicle types. • Share of BEVs/FCEVs in in-use vehicle fleets: 87% for passenger cars, trucks and buses and 100% for motorcycles.	-51%
	Fuel mix	• 76% is biofuels + electricity + hydrogen and assuming synthetic fuel is zero. • Biofuel share represents 1% of total liquid fuel consumption in 2023.	

Note: In the CNF+ scenario CNF supply is roughly 1.2 times greater than in the CNF scenario, assuming that about half of sustainable aviation fuel in 2050 is produced via Fischer-Tropsch synthesis; the additional supply is preferentially allocated to Africa, the Middle East, India, and ASEAN, where power sector decarbonization poses a challenge.

In all non-BAU scenarios, CO₂ emissions fall by 35% to 51% compared to 2020.
(CO₂ emissions just meet or are within the IPCC 1.5°C climate scenarios' -42% to -68% range in 2050.)

New Passenger Car Sales (Middle East)

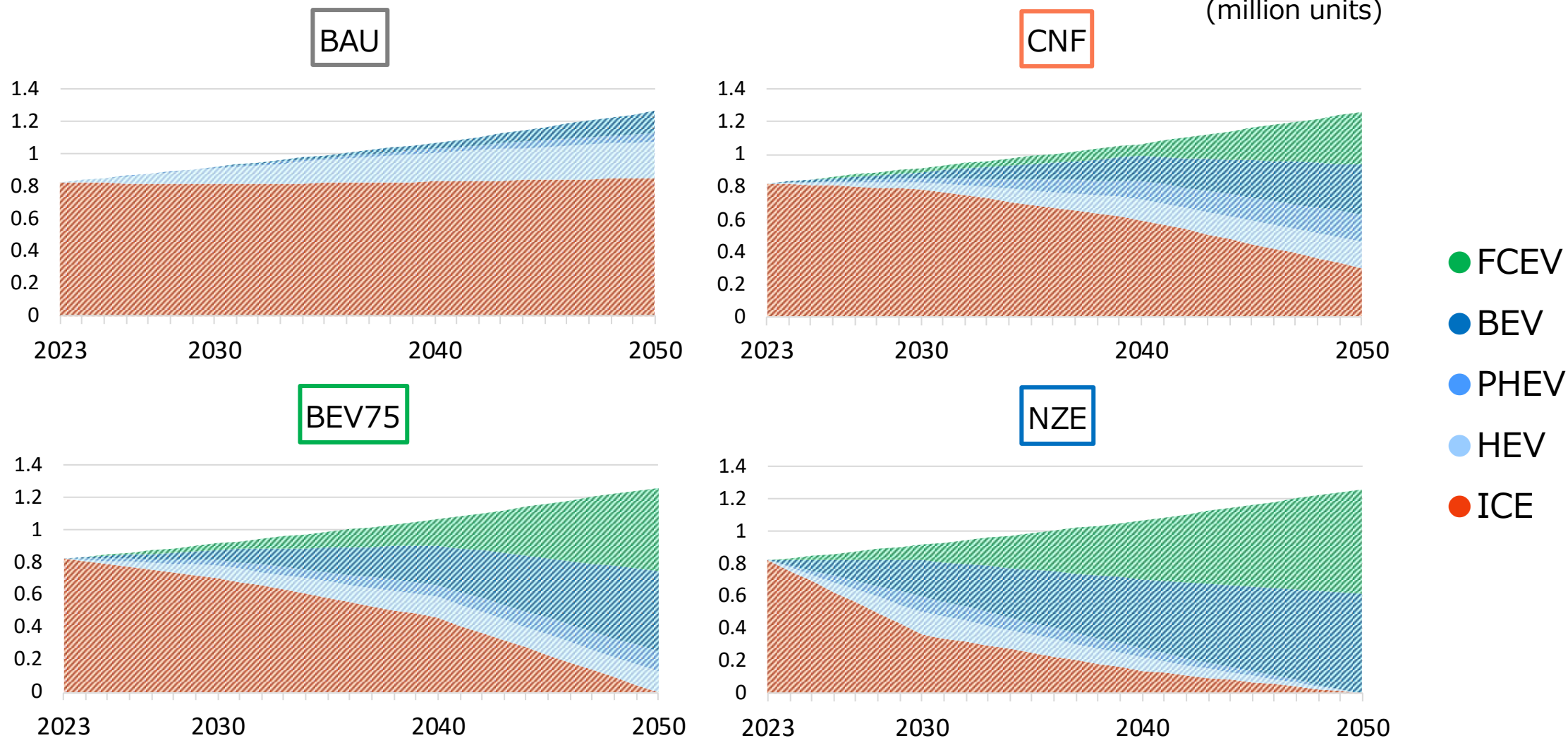
(million units)



Note: Historical values are based on estimates by the IEEJ's Energy and Data Modelling Center (EDMC). Future total new vehicle sales are EDMC estimates, and EDMC estimated the powertrain mix using assumptions from JAMA scenarios.

New Truck and Bus Sales (Middle East)

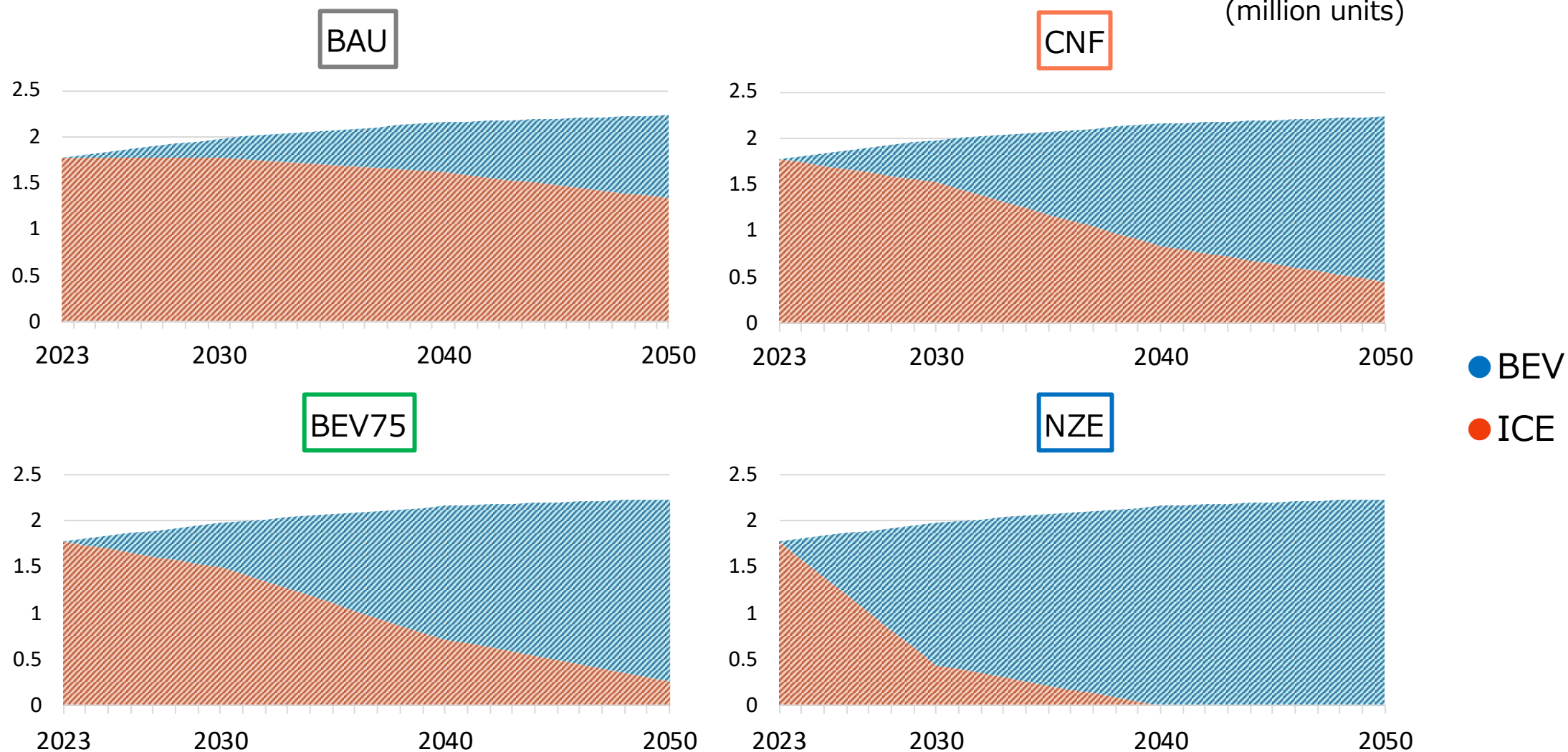
(million units)



Note: Historical values are based on EDMC estimates. Future total new vehicle sales are EDMC estimates, and EDMC estimated the powertrain mix using assumptions from JAMA scenarios.

New Motorcycle Sales (Middle East)

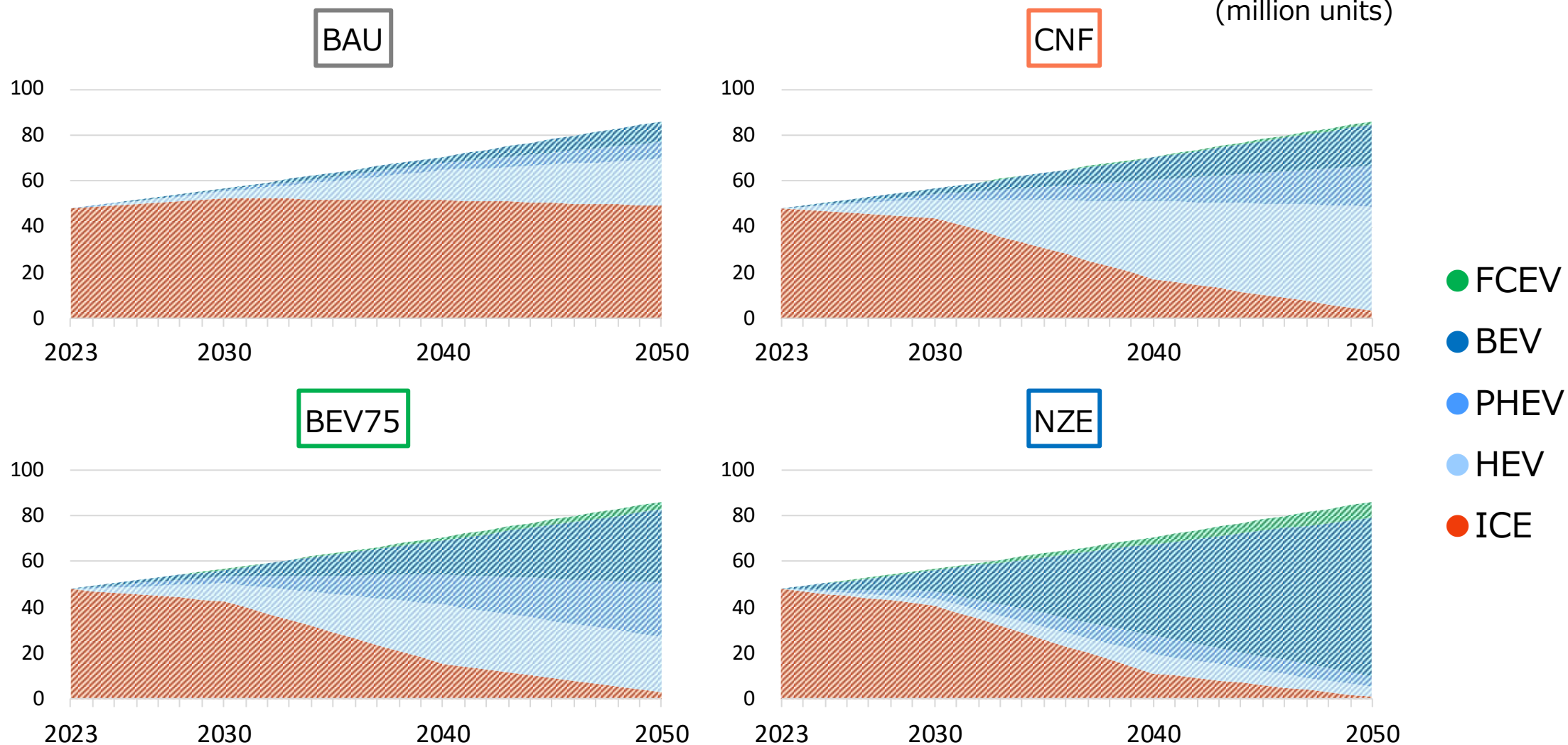
(million units)



Note: Historical values are based on EDMC estimates. Future total new vehicle sales are EDMC estimates, and EDMC estimated the powertrain mix using assumptions from JAMA scenarios.

In-Use Passenger Car Fleet (Middle East)

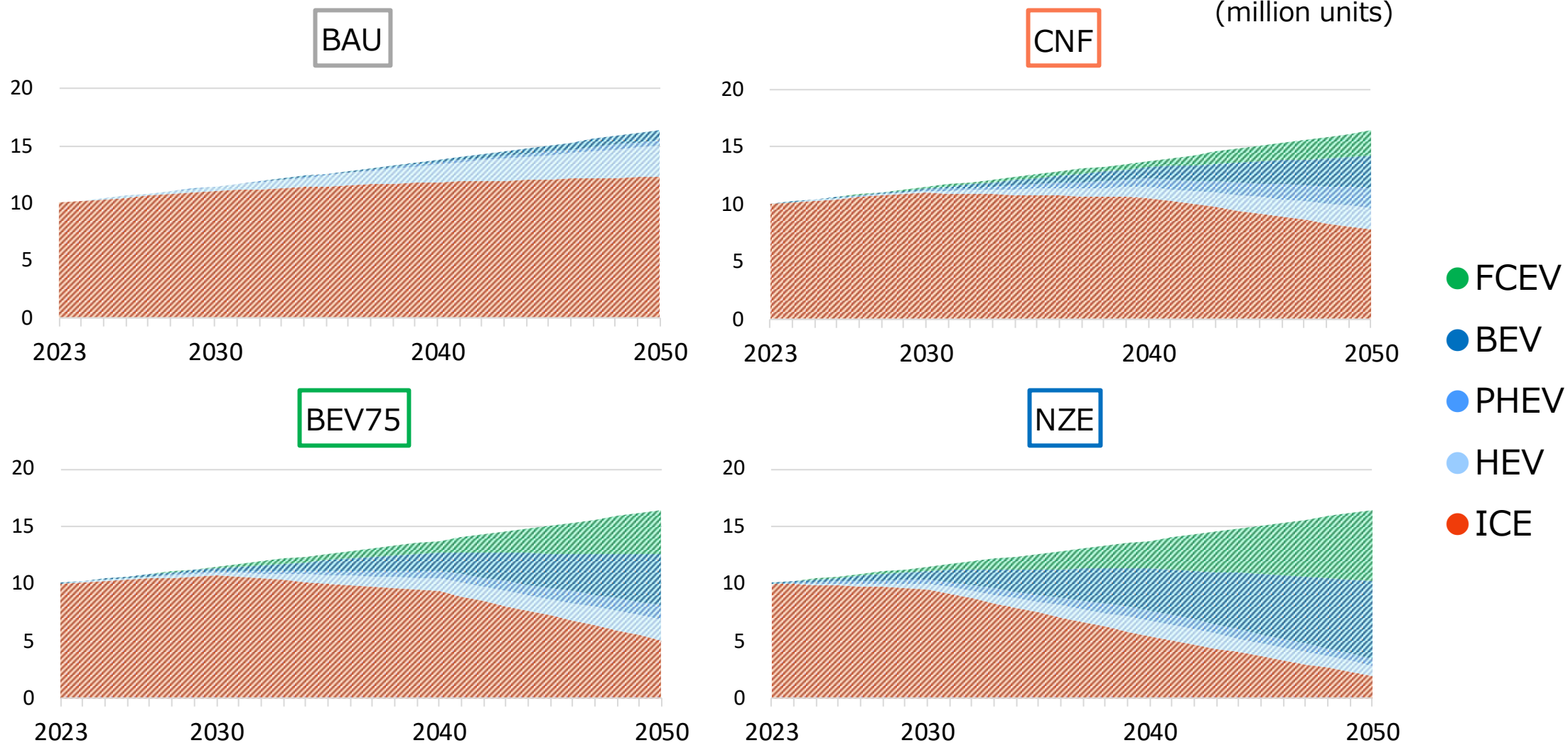
(million units)



Note: Historical data based on the 2026 edition of the EDMC Handbook of Japan's & World Energy & Economic Statistics (JAMA's previous analysis was based on the Handbook's 2022 edition); in-use car fleet projections based on [IEEJ Outlook 2026](#) (published 2025); powertrain mix projections based on JAMA scenarios.

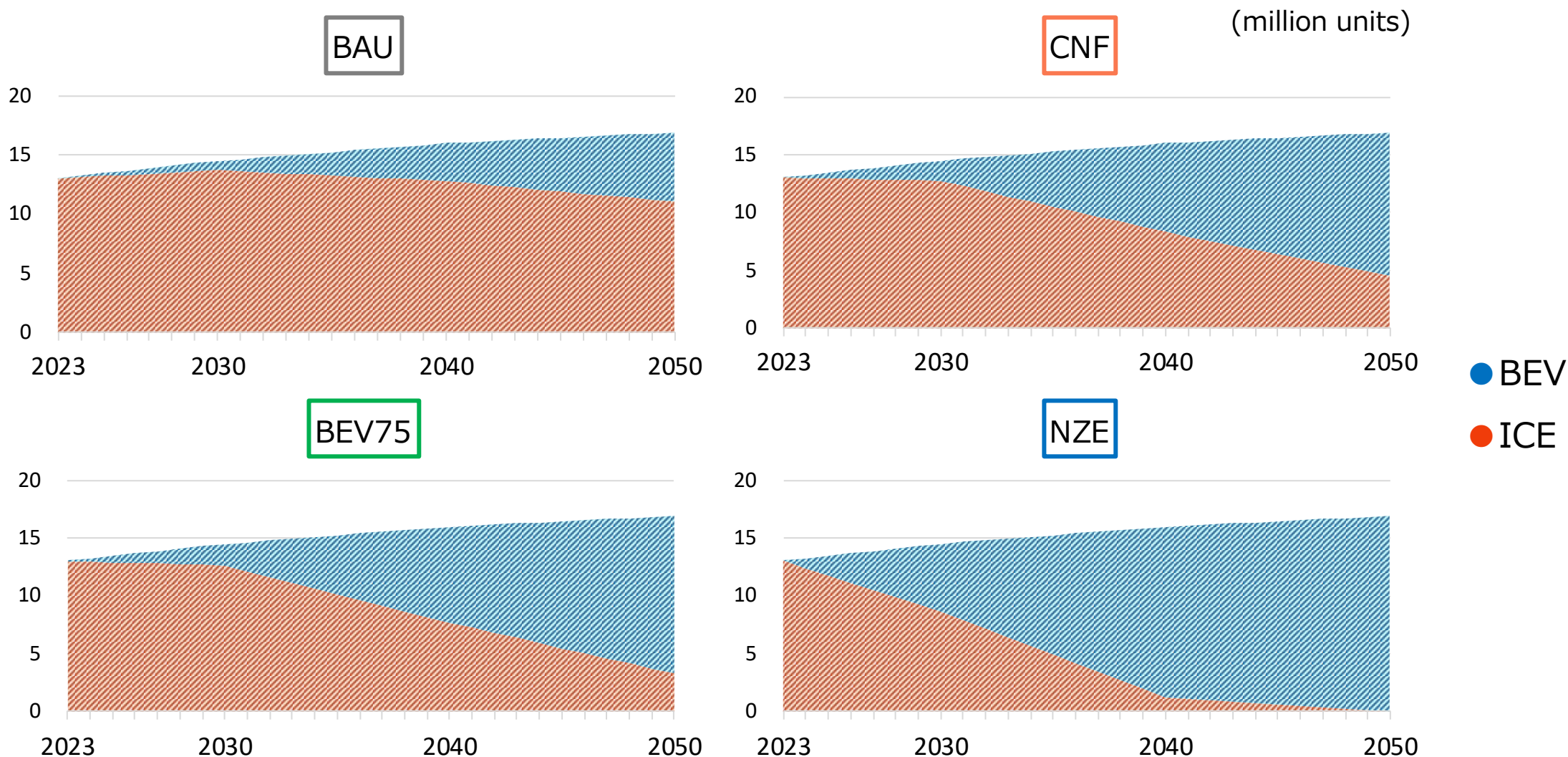
In-Use Truck and Bus Fleet (Middle East)

(million units)



Note: Historical data based on the 2026 edition of the EDMC Handbook of Japan's & World Energy & Economic Statistics (JAMA's previous analysis was based on the Handbook's 2022 edition); in-use car fleet projections based on [IEEJ Outlook 2026](#) (published 2025); powertrain mix projections based on JAMA scenarios.

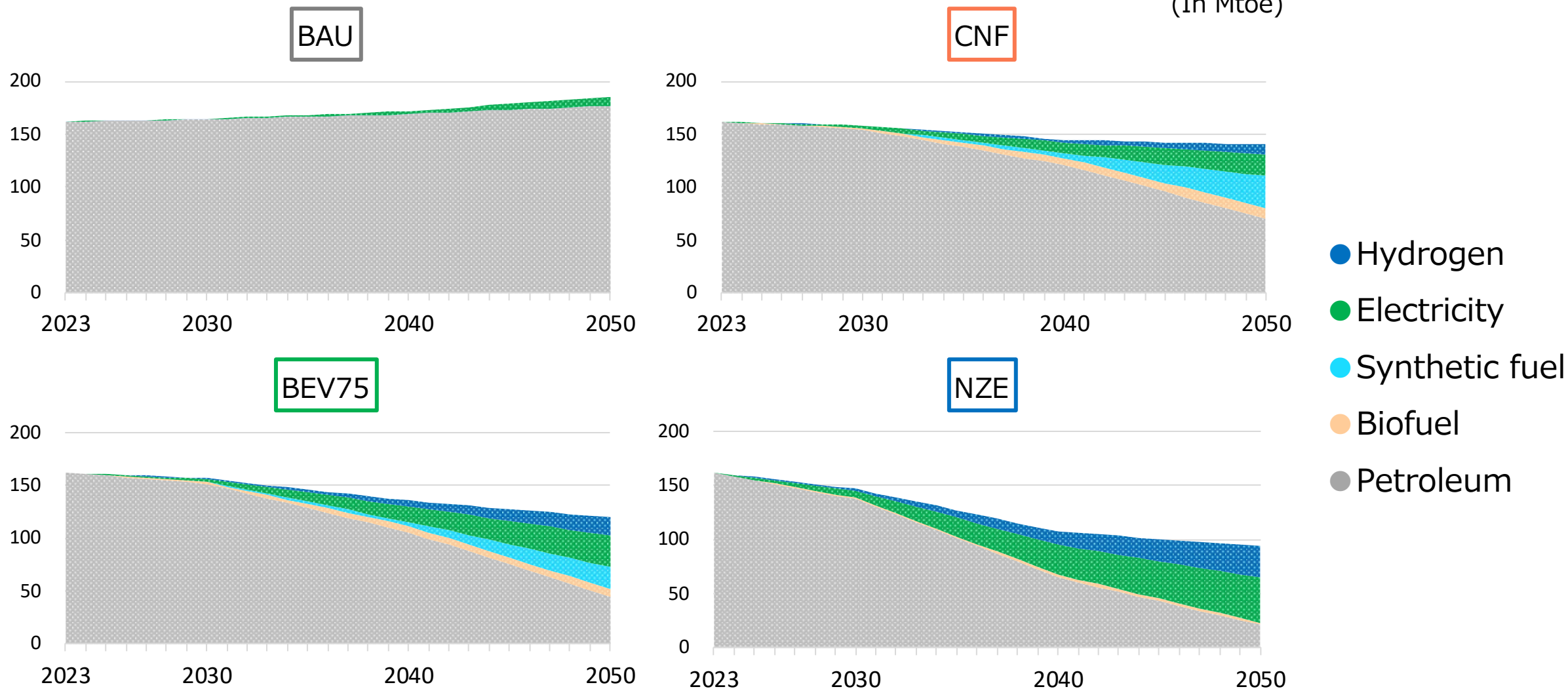
In-Use Motorcycle Fleet (Middle East)



Note Historical values are EDMC estimates using [IRF World Road Statistics](#) and national statistics. In-use fleet projections are EDMC estimates, and EDMC estimated the powertrain mix using JAMA scenarios.

Automotive Fuel Mix (Middle East)

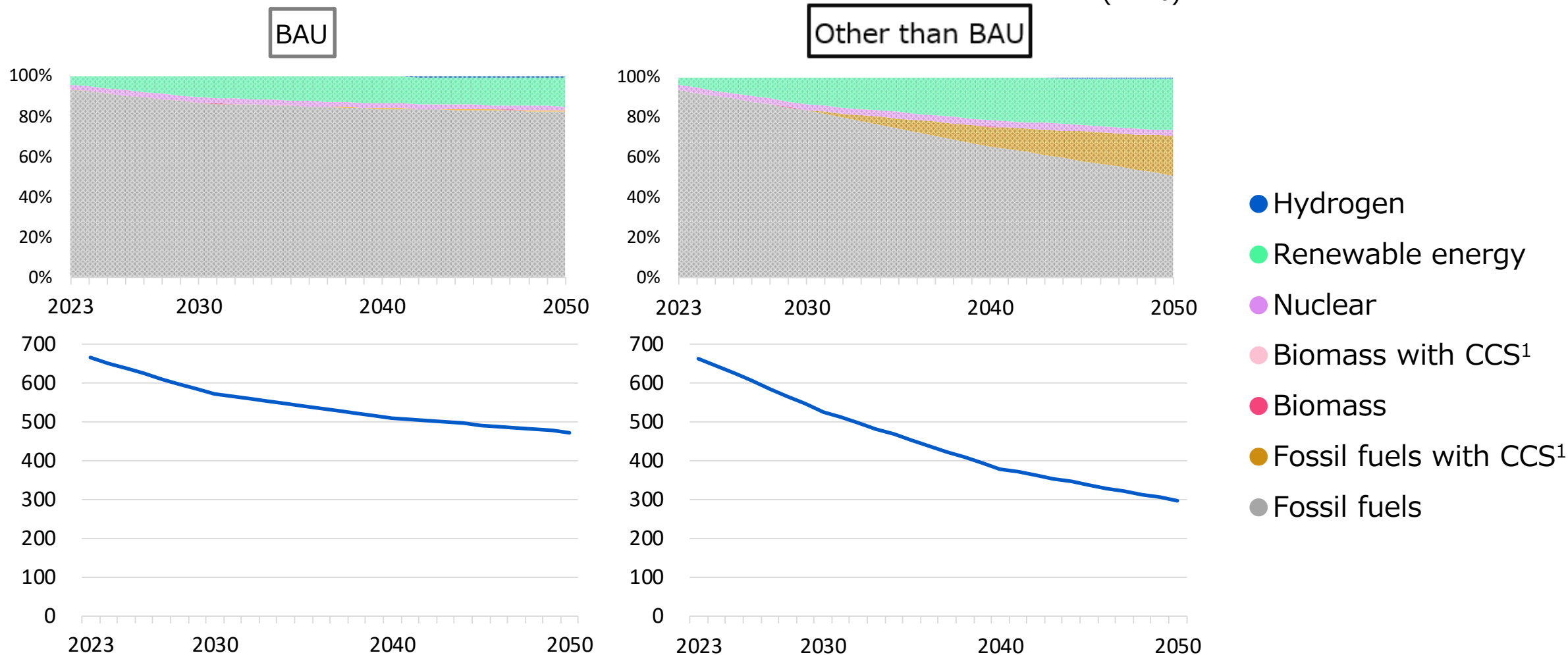
(In Mtoe)



Note: Historical values are EDMC estimates. EDMC also estimated future values, based on JAMA scenarios.

Energy Mix (Middle East)

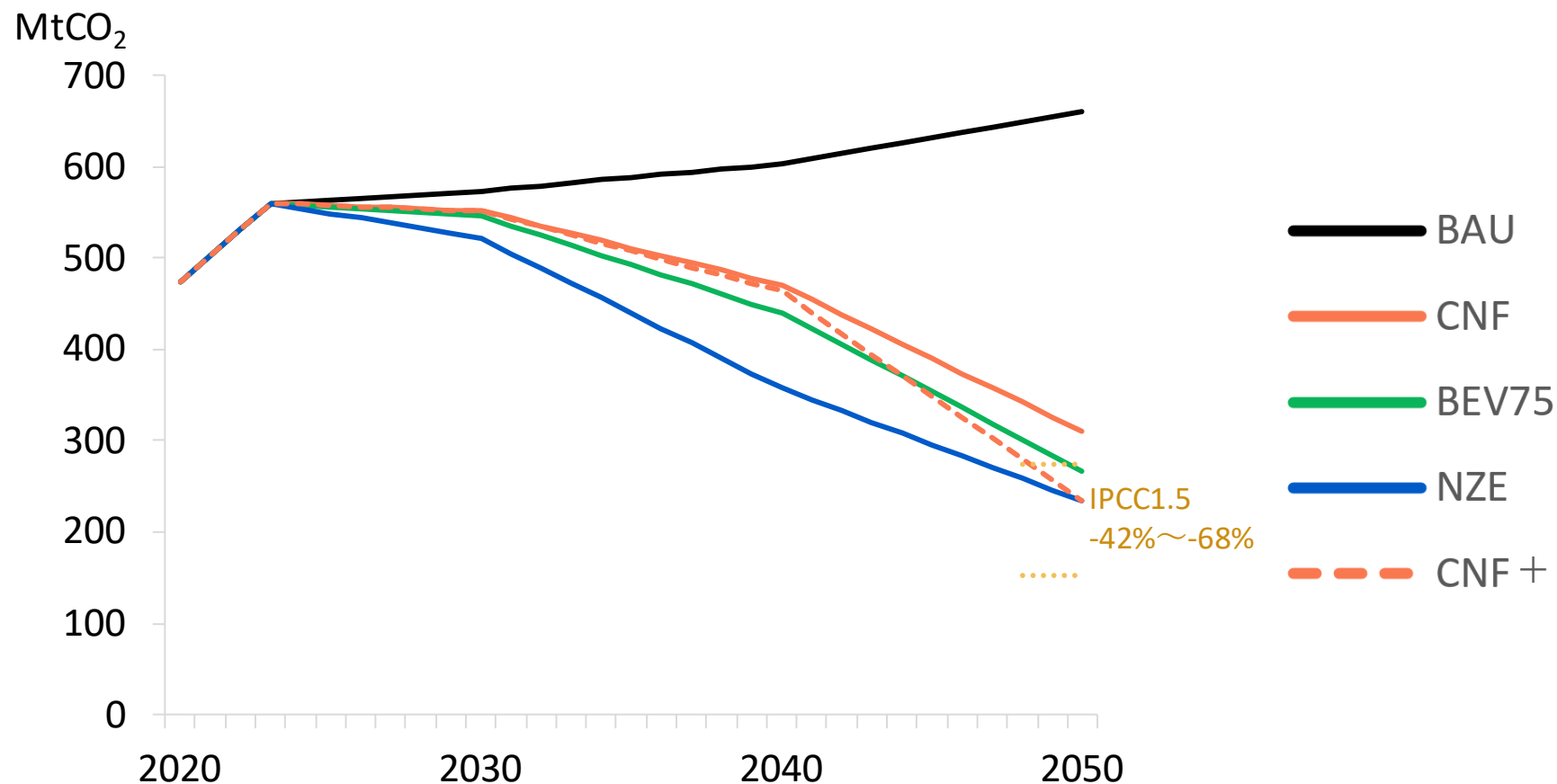
(In %)



¹CCS: Carbon capture and storage is a technology used to reduce atmospheric CO₂ emissions by capturing CO₂ emitted from power plants, factories, and other sources and storing it underground or in other locations.

Note: Historical data based on [IEA World Energy Balances](#); future projections based on [IEEJ Outlook 2026](#) (published 2025).

CO₂ Emissions (Middle East)



Note: "IPCC 1.5°C (-42% to -68%)" refers to the interquartile range of scenarios, presented in Chapter 10 of the IPCC WG III Sixth Assessment Report, that limit global warming to 1.5°C with no or limited overshoot. In those scenarios, CO₂ emissions from the global transport sector are reduced by approximately 42% to 68% by 2050 relative to 2020 levels. Values within or below this range can be regarded as consistent with the IPCC 1.5°C goal.

In all non-BAU scenarios, CO₂ emissions fall by 35% to 51% compared to 2020.
(CO₂ emissions just meet or are within the IPCC 1.5°C climate scenarios' -42% to -68% range in 2050.)