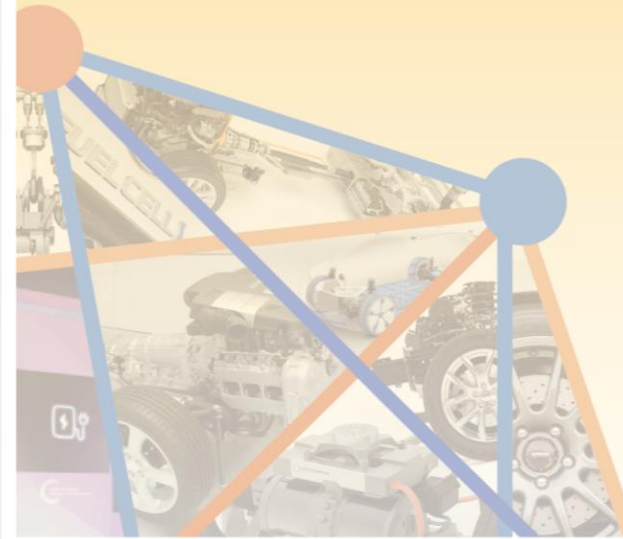


An electrifying decade ahead

- Regulations, fines and incentives are driving current shift in electrification
- Changing mobility and consumer habits
- Investments in electromobility value chain – lithium-ion battery production, charging infrastructure, EV architecture
- New suppliers, new logistics locations, regulations and bottlenecks
- Impacts for the Middle East and Africa?

Automotive Powertrain Forecast 2020 - 2030

Navigating Regional
and Regulatory Divergence
on the Road to Electrification

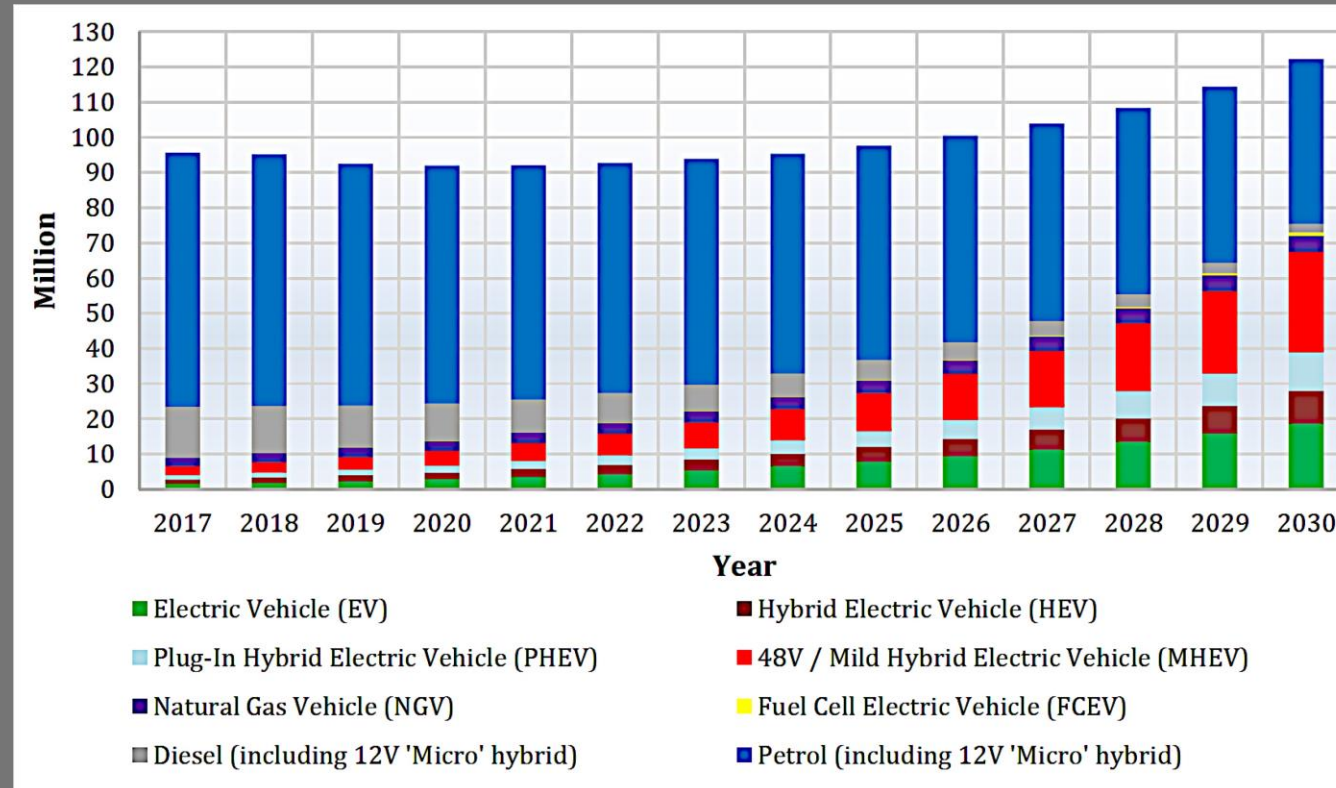


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LOGISTICS

Christopher Ludwig,
editor-in-chief

Global new vehicle sales forecast by powertrain type

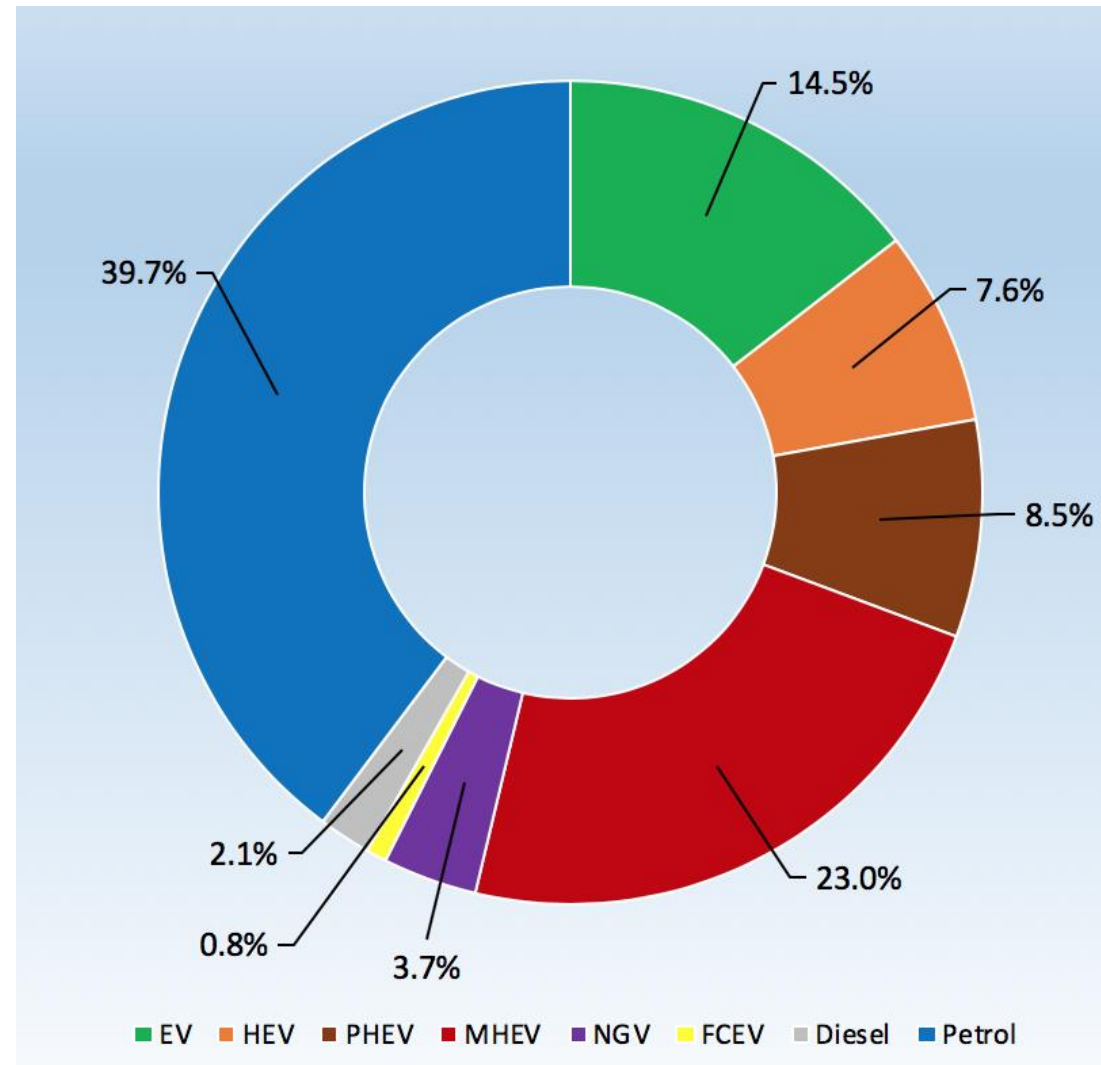


Source: Automotive from Ultima Media, Business Intelligence

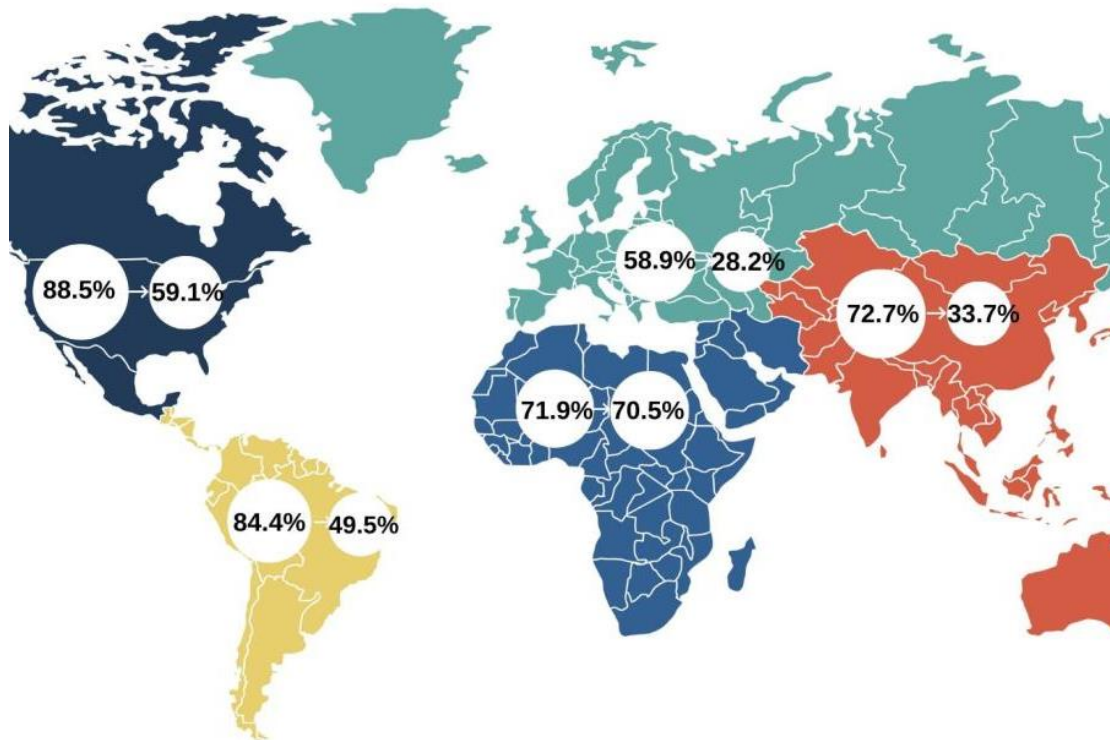
- Sluggish global growth and trade outlook for next 4-5 years
- Today it's regulations, but tomorrow infrastructure, total cost of ownership & product quality will drive EV growth (TCO parity w/ICE expected 2025/2028)

Global automotive powertrain mix forecast 2030

- Fragmentation across powertrain types, possibly even consumer confusion
- Electrified powertrains (EV, hybrid, plug-in) to reach more than 50%



Source: Automotive from Ultima Media, Business Intelligence



Source: Automotive from Ultima Media, Business Intelligence

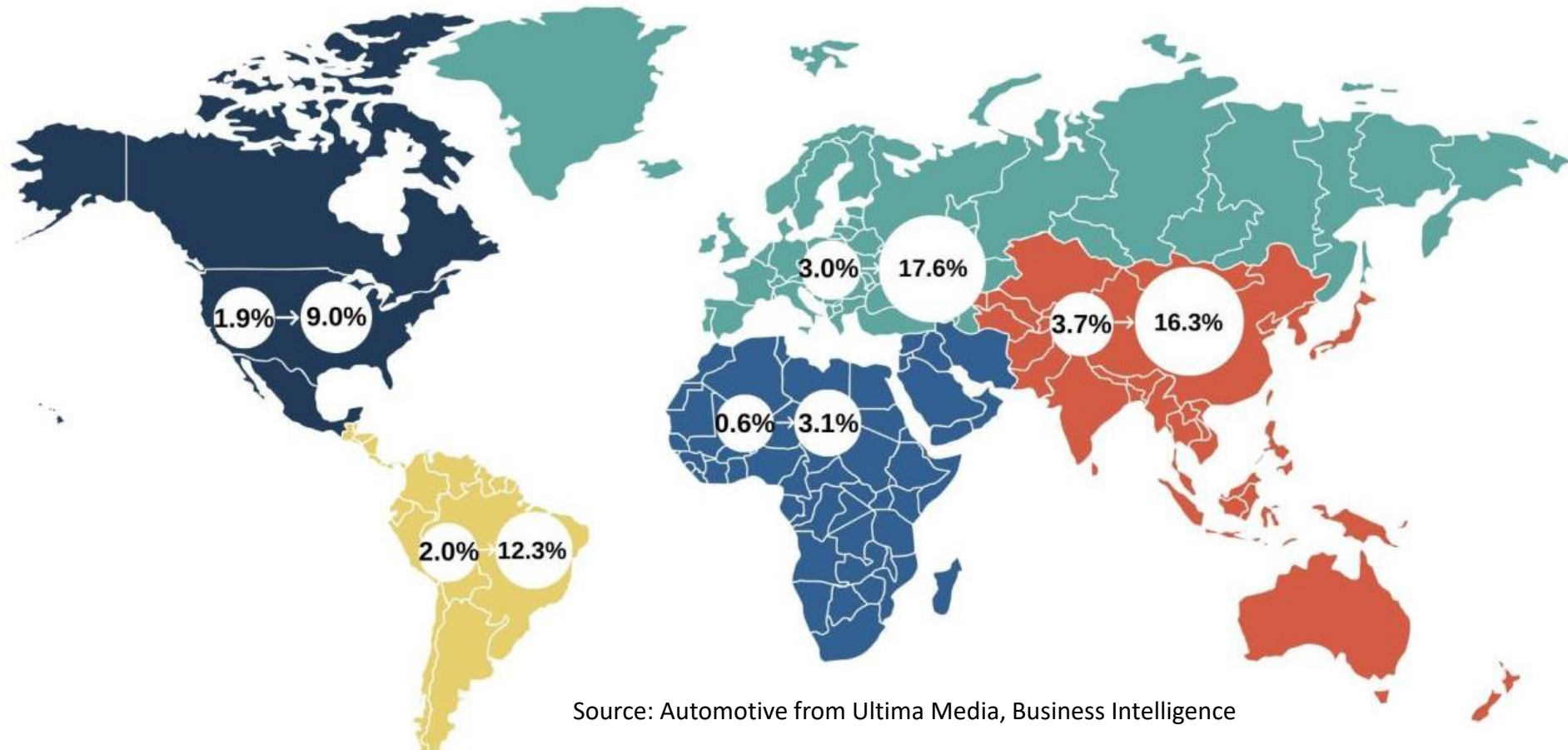
Petrol powertrain new vehicle market share 2020 vs 2030

By 2030...

- Pure petrol still nearly 40% of global powertrains, with regional variation
- Highest market share will remain in Middle East and Africa, where natural gas also maintains strong share
- Petrol will still feature in more than 80% of ICE and hybrid powertrains



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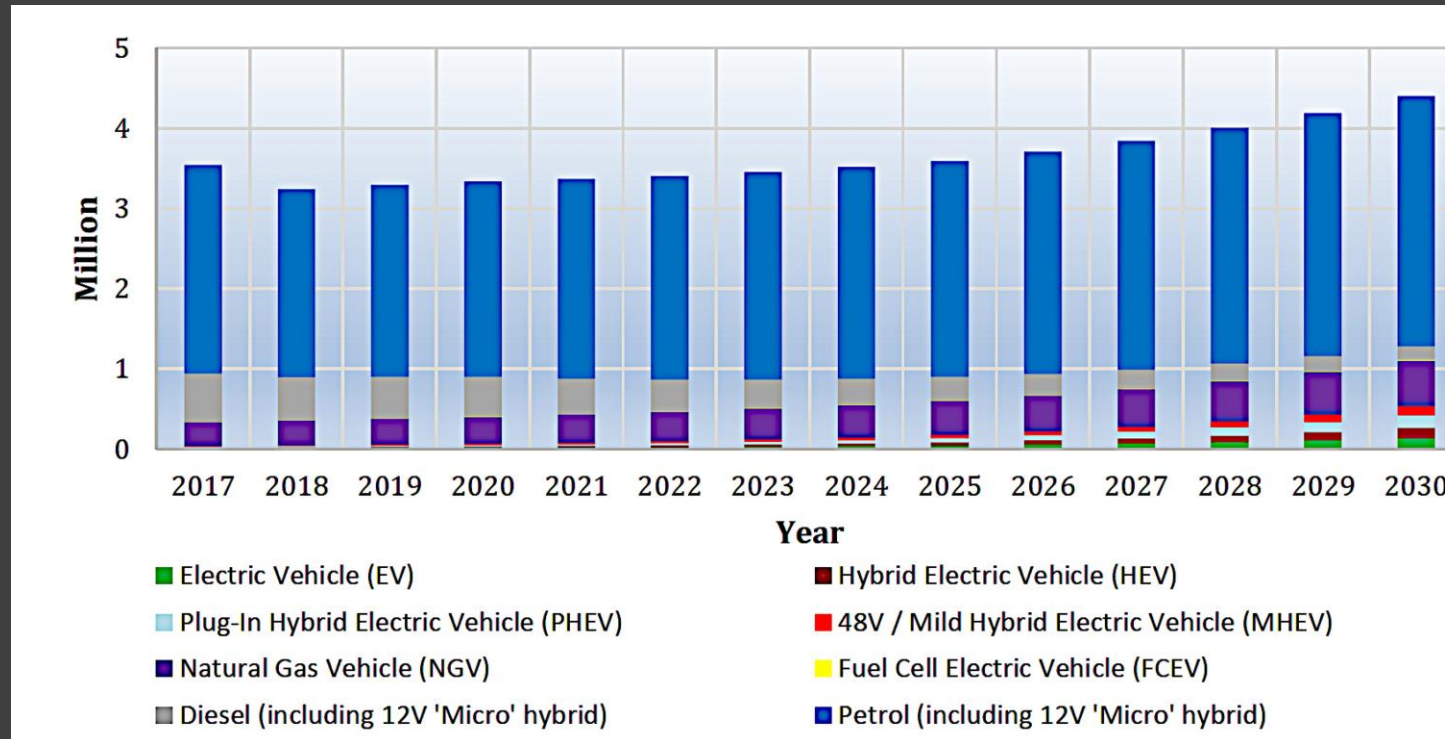


Source: Automotive from Ultima Media, Business Intelligence

Battery EV powertrain new vehicle market share 2020 vs 2030

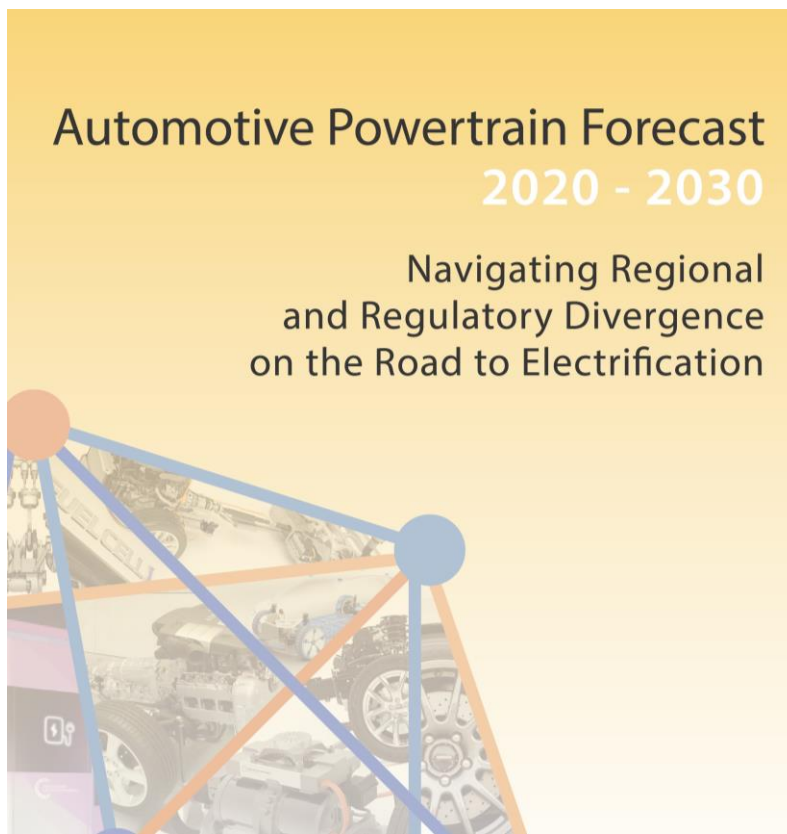
- Global EV offensive already ramping up (i.e. Tesla in Germany, China; VW in Europe, US, China)
- Regional variation in EV will become more pronounced – causing some challenges in economies of scale and supply chain
- ME & Africa expand but from small base

Middle East & Africa vehicle sales forecast by powertrain type



Source: Automotive from Ultima Media, Business Intelligence

- UAE and Saudi Arabia have introduced fuel emission policies
- Barriers to EV: low fuel prices, fewer regulations, lack of infrastructure
- Growth in natural gas expected, diesel phasing out
- Africa is playing key, but complex role in battery supply chain



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