Al-Futtaim BURO HAPPOLD EVIQ Roland Berger

THE FUTURE OF MOBILITY IN SAUDI ARABIA

Converging ambition and adoption in the Kingdom's transport sector

TABLE OF CONTENTS

Executive Summary

Saudi Arabia is entering one of the most transformative periods in its mobility journey. As the Kingdom accelerates its Vision 2030 ambitions, the movement of people, goods, and services is becoming a central pillar of economic competitiveness and social progress.

Against this backdrop, Al-Futtaim has developed *The Future of Mobility in Saudi Arabia*, a white paper that examines the emerging trends reshaping the sector and the policy, infrastructure, and technology shifts needed to build a cleaner, smarter, and more resilient mobility ecosystem.

The white paper draws on extensive market analysis, consumer insights, and contributions from a multi-stakeholder industry roundtable convened by Al-Futtaim and attended by public and private sector representatives, consultants, and mobility experts. Their collective perspectives highlight how Saudi Arabia can design mobility systems that anticipate population growth, evolving consumer expectations, and sustainability commitments. Three themes emerge strongly from the research.

First, Saudi consumers are redefining mobility demand. Rising interest in New Energy Vehicles (NEVs), digital-first services, and flexible ownership models are influencing investment decisions across the value chain.

Second, technology innovation, ranging from charging networks and smart infrastructure to connected platforms and advanced analytics, is rapidly expanding the possibilities for safer and more efficient mobility.

Third, as cities grow and logistics intensify, integrated planning will be essential to reduce congestion, improve air quality, and support high-performance urban environments.

The white paper also assesses the immediate and medium-term opportunities available to industry and government. These include accelerating NEV adoption, enabling scalable charging infrastructure, supporting fleet electrification, enhancing multi-modal transport options, and fostering regulatory frameworks that encourage innovation and build consumer trust.

Ultimately, the future of mobility in Saudi Arabia will be shaped by collaborative action. By aligning investment, policy, and technology, the Kingdom can unlock a mobility landscape that improves quality of life, and positions Saudi Arabia as a regional and global model for sustainable transport.

Foreword

Jerome Saigot
Managing Director
BYD KSA, Al-Futtaim

The way people move is no longer a technical question rooted only in transport infrastructure. It is now a broader social, economic, and environmental imperative that calls for collaboration across sectors and for bold, future-focused thinking.

At the *Future of Mobility in Saudi Arabia* roundtable, Al-Futtaim brought together regulators, transport operators, Original Equipment Manufacturers (OEMs), infrastructure providers and mobility innovators to engage in open dialogue on the policy, investment and consumer factors shaping the next phase of mobility. The discussion aimed to align perspectives, surface practical gaps and identify collaborative pathways that can accelerate progress in electric mobility, public transport usage and integrated mobility systems.

The contributions of these experts highlight an emerging consensus: that the future of mobility in the Kingdom will depend on integrated systems, data-led planning, and solutions that prioritise both environmental responsibility and social inclusion. The rise of electrification, multi-modal transport, digitally enabled services, and circular economy models all present opportunities for meaningful impact when embraced coherently and at scale.

At Al-Futtaim, we believe mobility must evolve with intention, guided by innovation and grounded in sustainability. Every decision made today, from infrastructure investment to consumer engagement, will influence how successfully the Kingdom navigates rapid urbanisation, demographic expansion, technological disruption, and shifting consumer expectations. This white paper aims to offer a clear, pragmatic view of what that future can look like, and the strategic choices required to get there.

As one of the region's leading mobility partners, we see immense potential in amplifying public-private collaboration to unlock innovation and expand access to sustainable transport choices. Our goal is to ensure that the transition ahead is not only efficient, but equitable, improving quality of life and aligning with the Kingdom's broader sustainability aspirations.

We hope this white paper serves as both a guide and an invitation. A guide to the challenges and opportunities shaping the future of mobility in Saudi Arabia, and an invitation to jointly to build a transport landscape that is inclusive, and ready for the decades to come.

Foreword

Mohammad Bakr Gazzaz
Chief Executive Officer & Board Member
Electric Vehicle Infrastructure Company (EVIQ)

Saudi Arabia is rapidly shaping the future of electric mobility and taking clear and decisive steps to build a strong electric vehicle (EV) ecosystem. The Kingdom has committed to steel mining projects, manufacturing, and battery production, reflecting a long-term strategy to become a competitive player in the global EV industry.

Although the EV market in Saudi Arabia is still in its early stages, it has witnessed a strong growth over the past two years, driven by the entry of leading global automakers such as Mercedes-Benz, BMW, BYD and Tesla, highlighting an increasing confidence in the Saudi EV market.

As a national EV infrastructure leader backed by the Public Investment Fund and Saudi Electricity Company, EVIQ stands at the forefront of this transformation, executing an ambitious roll-out of public charging stations to meet the Kingdom's growing demand for electric vehicles.

By the end of January 2026, EVIQ is on track to have more than 50 charging stations in strategic locations, boasting more than 200 fast charging points across Riyadh, Jeddah, the Eastern Province, and key highways linking major cities. This is a critical step in enabling seamless, long-distance travel for EV drivers.

With a national target of 5,000 fast EV chargers across Saudi Arabia, EVIQ is deploying stations in strategic locations around the Kingdom in line with the growth of the domestic EV market, to ensure comprehensive coverage that caters to the needs of EV owners and contributes to EV adoption in the Kingdom.

This infrastructure will not only support a cleaner transport ecosystem but also drive economic diversification, enhance urban connectivity, and cement the Kingdom's leadership in sustainable mobility.

Foreword

John Gillespie
Director – Transport & Mobility
Buro Happold

The debate around the future of mobility continues to gather momentum, and for good reasons. We are living through a moment where technological possibility, societal expectations, and environmental urgency are converging at an unprecedented speed.

As new modes, digital platforms, and autonomous systems emerge, the questions we face are no longer simply technical; they are deeply human, and they demand integration at a scale far beyond traditional transport systems. How do we create mobility that is accessible, equitable, safe, sustainable, and resilient, while still embracing human-centric principles and innovation?

Society is asking for more than efficiency. People want mobility that is safe, affordable, intuitive, and seamlessly woven into daily life. They want cities that prioritise wellbeing over congestion, and choice over constraint. Meeting these needs requires us to look beyond infrastructure and consider behaviour, culture, and the lived experience of every user.

Yet as designers, planners, and even everyday travellers, we bring our own biases to the table. We often default to the modes we know, the technologies we trust, or the assumptions shaped by decades of car-centric thinking. The future of mobility is not purely rational; our transport choices have become extensions of identity: status symbols, comfort zones, storage spaces, lullabies for our children, cultural traditions and the freedom to go anywhere at any time.

But we cannot allow the past to define the possibilities ahead. In a country that is actively embracing change, we must embed that same ambition into our future thinking. The task before us is to design mobility systems that reflect the aspirations of a society accelerating at pace; systems that are innovative, efficient, environmentally-friendly and human-centred, and ready for what comes next.

Foreword

Arvind CJ
Partner and Middle East Automotive Sector Lead
Roland Berger

From a market historically defined by imports and conventional ownership models, Saudi Arabia's automotive and mobility sector is evolving into a more localised and technologically enabled ecosystem, closely aligned with its broader economic and industrial ambitions.

Vehicle demand remains robust, with annual sales exceeding 800,000 units in 2024 and projected to surpass one million units within the next decade. This growth reflects a structural increase in mobility demand driven by urbanisation, economic diversification, and shifting consumer expectations.

At the same time, electrification is beginning to gain traction. New energy vehicle sales crossed 10,000 units in 2024, marking an early inflection point in consumer adoption. While EV penetration remains modest, momentum is building as charging infrastructure expands, model availability improves, and familiarity with electric powertrains increases.

Localisation sits at the centre of this transformation, signaling a shift from market participation toward industrial value creation. This ambition is already taking shape through the establishment of three OEM manufacturing programmes: Lucid, Ceer, and Hyundai, which together are expected to produce more than 350,000 vehicles at a steady state. These programmes represent not only capacity expansion, but also a platform for skills development, technology transfer, and supply chain integration.

Supplier localisation is also progressing alongside vehicle manufacturing. Over time, this is expected to support greater resilience and strengthen the domestic automotive ecosystem.

Looking ahead, EVs are anticipated to move from early adoption toward broader market penetration, supported by continued infrastructure rollout and a more defined regulatory environment. In parallel, advanced driver-assistance features are likely to become standard across vehicle segments. Fully autonomous vehicles, while technically advancing, are expected to remain limited to targeted and controlled use cases in the medium-term.

Mobility Under Vision 2030

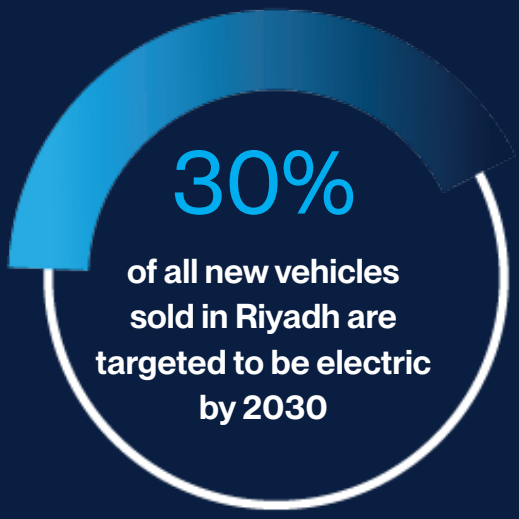
Saudi Arabia's Vision 2030 frames mobility not simply as transport policy but as an engine for jobs, technology transfer and urban transformation.

Riyadh has set a clear and measurable target to accelerate electrification. By 2030, 30% of all new vehicles sold in the capital are expected to be electric.

This commitment anchors municipal planning and signals to manufacturers, investors and charging operators that demand-side policy will be matched by city-scale infrastructure and regulatory support. Meanwhile, Saudi Arabia is aiming to become an automotive manufacturing hub, producing 500,000 EVs annually by the end of the decade.

This strategic direction has already attracted major investment in both manufacturing and infrastructure. International and national automotive projects, including the establishment of EV plants and homegrown brands, demonstrate the Kingdom's intent to localise value chains and create high-skill employment. Examples include high-profile manufacturing initiatives and nascent domestic EV marques that are aligned with the Public Investment Fund's (PIF) industrial objectives.

Infrastructure development is progressing in parallel. The Kingdom's Electric Vehicle Infrastructure Company (EVIQ), a joint venture between PIF and Saudi Electricity Company (SEC) and supported by strategic partners, is scaling a national charging network with a roadmap to deliver thousands of high-power fast chargers[2] across urban corridors and highways by 2030.



The National Industrial Development and Logistics Program (NIDLP) is central to Saudi Arabia's ambition to build a competitive automotive industry and strengthen its position as a regional manufacturing and logistics hub.

The programme aims to attract global manufacturers, develop supporting supply chains and increase localisation, reflecting Vision 2030 priorities of job creation, industrial diversification and improved trade balance. Within the automotive pillar, NIDLP promotes both ICE and electric vehicle technologies, encourages OEM-led cluster development, and supports SMEs through dedicated industrial policies.

Ongoing initiatives, including the Automotive Development Programme and new investment incentives, are designed to build a domestic ecosystem capable of serving local and regional demand while expanding future export capacity.

This geography-first approach prioritises large cities and key transport arteries to ensure drivers can rely on charging access within dense metropolitan areas while enabling a phased expansion into intercity and regional routes.

Taken together, Vision 2030's priorities, city-level electrification targets, industrial localisation, and charging network commitments form a coherent policy architecture for change. Yet, the path from ambition to scale depends on closing critical gaps: affordability, consumer confidence in charging and servicing, and the maturity of local supply chains.

Regulations streamline progress

Saudi Arabia has moved decisively to convert its sustainability ambition into technical standards that support rapid electrification and the safe rollout of new mobility modes.

Regulation of charging infrastructure is now formalised through technical requirements and mandatory rules for siting, signage, safety and accessibility. The Ministry of Municipalities and Housing's technical guidance for EV charging sets out practical standards for charger installation, location selection, pedestrian safety and multilingual user instructions that improve consistency and user experience across public and private sites[3]. These instruments reduce deployment risk for operators and give consumers clearer expectations of safety and reliability.

The Kingdom has also rolled out a practical strategy when it comes to developing charging infrastructure, by concentrating early investment in high-traffic urban centres and strategic highway corridors to build user confidence while extending coverage over time.

EVIQ's roadmap, including its initial highway hub launches of 60 stations (of which 50 were live at the end of January 2025, with four located on highways) and a target and a target pipeline of 5,000 fast chargers in line with EV demand and adoption in the Kingdom, reflects that approach and infrastructure deployment with national EV targets.

Jointly backed by PIF and Saudi Electricity Company (SEC), EVIQ is building a Kingdom-wide fast-charging network and publishes station specifications that favour internationally recognised fast-charging connectors such as Combined Charging System 2 (CCS2), signalling de facto alignment with global interoperability expectations[5].

Meanwhile, Electromin (a subsidiary of Petromin) is aiming to install 23,200 EV chargers across its 9,000 stations by 2030[6].

Alongside charging standards, Saudi regulators are developing frameworks for autonomous[7] and shared mobility. The Transport General Authority (TGA) has established regulatory sandboxes and licensing pathways to accommodate pilot operations, mapping exercises and safety oversight. Permits issued to autonomous operators[8] and early pilot corridors, show a pragmatic, phased pathway from controlled trials to scaled deployment, with data governance and cross-agency coordination highlighted as priorities.

Progress on policy and regulations create a predictable environment for investors and operators. Key next steps are clear: formalise fast-charging interoperability at scale, continue to harmonise technical and data standards across agencies, and publish transparent approval and liability rules for autonomous and shared services. Doing so will reduce commercial uncertainty, accelerate private investment and make it easier for consumers to trust and adopt new mobility options across Saudi cities.

What Consumers Are Saying About NEVs

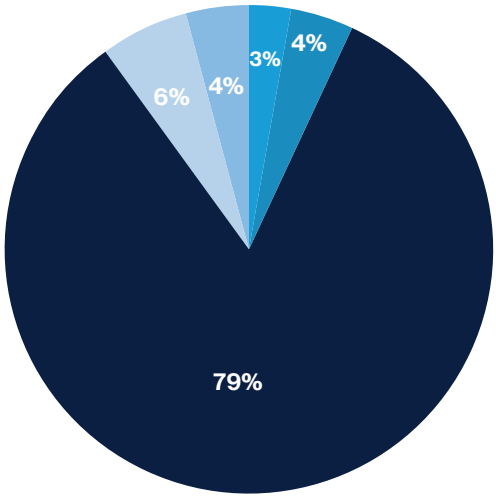
Saudi Arabia's transition to cleaner, smarter mobility sits at the heart of its economic and industrial ambitions. Vision 2030 places transport modernisation alongside industrial diversification, and the rapid emergence of national champions in manufacturing, charging and advanced mobility reflects how seriously this agenda is being pursued.

Despite strong momentum, participants at the Al-Futtaim industry roundtable noted that public enthusiasm has not yet translated into widespread adoption. Findings from our inaugural Future of Mobility in Saudi Arabia survey of 1,000+ Saudi-based consumers echo this sentiment. 71% of respondents reported being familiar with NEV technology, and 79% indicated they were likely to consider purchasing an NEV as their next vehicle.

However, the market remains anchored by traditional Internal Combustion Engine (ICE) vehicles, with 85% of respondents stating that they primarily drive a petrol or diesel vehicle. Contrastingly, only 4% frequently drive a Hybrid Electric Vehicle (HEV) or Plug-In Hybrid Vehicle (PHEV), while a modest 3% drive a Battery Electric Vehicle (BEV).

Market Share

"What type of vehicle do you currently own or use most often? (If you use multiple vehicles, please select the one you use most often)"



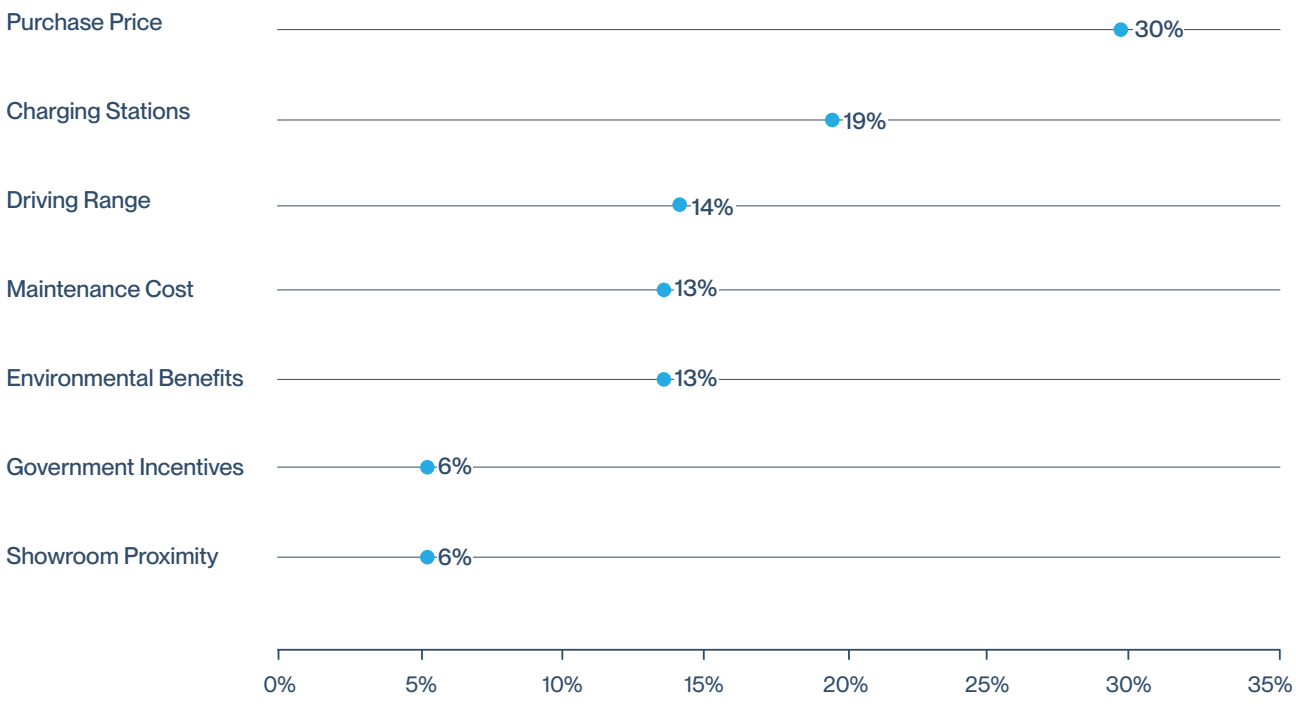
Source: Al-Futtaim Future of Mobility in Saudi Arabia Survey; August 2025

These insights tell us that interest is strong, but there remains some way to go. Interestingly, when asked what criteria are most important when purchasing a new vehicle, more than half of the respondents cited lower cost of ownership and reduced environmental impact as joint priorities.

These value drivers are well-aligned with the core benefits of NEVs (with several studies indicating that while electric cars may have higher upfront costs, Total Cost of Ownership (TCO) tends to be lower than ICE cars due to reduced fuel and maintenance expenses[9]).

NEV Buying Decisions

"What factors would most influence your decision to purchase a New Energy Vehicle (NEV)?"



Source: Al-Futtaim Future of Mobility in Saudi Arabia Survey; August 2025

Solely, however, environmental benefits do not rank as a high priority for Saudi consumers looking to purchase an NEV. Instead, 30% said affordability is the most important factor influencing their decision, followed by proximity to charging stations (19%) and driving range (14%). At 13% each, both maintenance costs and environmental benefits individually rank lower than expected.

Participants at the roundtable similarly highlighted how the price disparity between electric and ICE car models is a decisive barrier. Insights from the International Energy Agency's (IEA) Global EV Outlook 2025 states that falling battery prices, intensifying market competition and carmakers reaching economies of scale have driven down pricing of electric vehicles globally, albeit unevenly.

Prices in China and other emerging markets, for instance, are lower due to intense local competition, affordable small and medium-sized models, and supportive policies, while in Europe and the US, prices remain higher because automakers focus on premium models, competition is weaker in the low-cost segment, and larger vehicles dominate sales. This disparity affects adoption, making affordable models crucial for mass-market uptake.

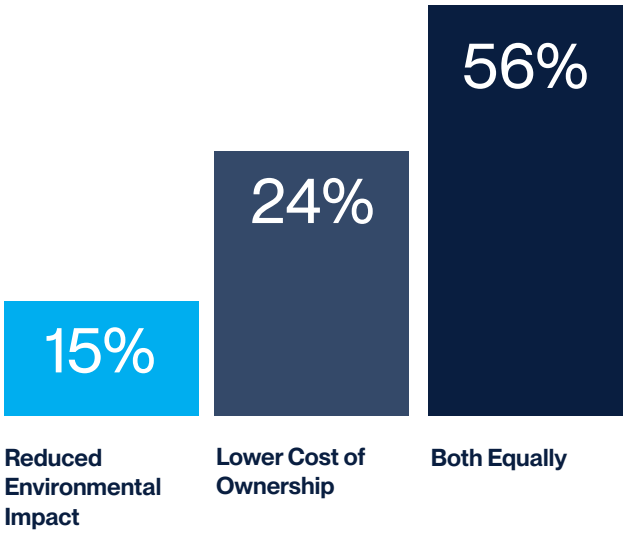
New Energy Vehicles (NEVs)

NEVS refer to cars that use alternative, cleaner energy sources instead of conventional internal combustion engines. They include Battery Electric Vehicles (BEVs), Plug-In Hybrid Electric Vehicles (PHEVs), and Hybrid Electric Vehicles (HEVs), all of which contribute to reducing emissions and improving energy efficiency. BEVs run solely on electricity, PHEVs combine electric motors with rechargeable batteries and a petrol engine, and HEVs use an electric motor to support a traditional engine without external charging.

Early adoption also relies on significant financial stimulus. Most European Union (EU) member states offer some form of tax benefit for electric vehicles and charging, including purchase subsidies, road tax relief and import duties exemption. China has implemented subsidies and tax relief for electric vehicles for more than two decades now to catalyse early demand before gradually scaling back in the wake of a maturing market. Similar initiatives can be explored to boost adoption in Saudi Arabia.

Purchase Priorities

"Which of the below factors matters the most to you when choosing a vehicle?"



Source: Al-Futtaim Future of Mobility in Saudi Arabia Survey; August 2025

At the same time, roundtable participants agreed that any incentive programme must stimulate demand while reinforcing, not weakening, the viability of national manufacturing. Broad subsidies should come only once local production is operational and capable of competing. If locally produced EVs can reach near parity with ICE models, incentives may be less necessary. If costs remain high, targeted support may still be required but must be structured carefully to ensure fair competition, between domestic and imported brands.

Perceptions and Hurdles Surrounding NEV Adoption

A deeper dive into barriers impeding NEV adoption among Saudi consumers paints a telling picture.

When asked about their concerns with owning an NEV, half of the respondents cited purchase price as a challenge, while 46% pointed to long charging times. 43% expressed range anxiety, and 40% highlighted the availability of spare parts, while 34% said that they lack sufficient knowledge. These challenges appear both as personal hesitations and as broader ecosystem gaps within the Kingdom.

As production scales and competition increases, manufacturing costs are expected to fall, making NEVs more accessible to mainstream consumers. However, alongside improving vehicle affordability, securing consumer confidence will become essential. Roundtable participants noted that many Saudi consumers remain unfamiliar with the full range of NEV technologies. A car manufacturer representative at the roundtable shared that extended test-drive programmes, discovery centres and educational initiatives successfully shift perceptions, with conversion rates reaching close to 80% among those who participate in longer trials.

Charging is another foundational criterion, and EVIQ, Electromin and other operators continue to scale charging infrastructure rapidly. Priority areas include Riyadh, Jeddah, the Eastern Province and major intercity highways, to ensure of ensuring charging access within 30 minutes across principal urban centres. By the end of 2025, EVIQ commissioned 45 charging stations in these regions[11].

In March 2025, it opened its first highway charging hub at SASCO Al-Jazeera on the Riyadh-Qassim route , and has completed three other stations on highways.

As of 14 December 2025, EVIQ has begun billing users at its public charging stations, an important shift that may impact behaviour and trust dynamics. This transition can be managed by ensuring transparent pricing and maintaining high charging reliability, to help protect consumer trust while easing the shift to paid usage.

While range anxiety persists, participants suggested that it is often more perception than reality. Upcoming price adjustments for charging may influence behaviour, while advances in ultra-fast charging technologies capable of reaching 80% charge in five minutes could significantly shift attitudes.

Case Study

KSA Charging Infrastructure

EVIQ Builds the Backbone of Saudi Arabia's EV Charging Network

One of the most critical barriers to EV adoption is the availability of reliable public charging infrastructure. Addressing this challenge head-on, EVIQ is playing a defining role in enabling the Kingdom's transition to electric mobility.

Over the past two years, EVIQ has accelerated the deployment of a nationwide fast-charging network, delivering more than 50 high-power EV charging stations across six major cities and four strategic highways in Saudi Arabia. This roll-out has directly addressed range anxiety as one of the primary concerns for EV drivers, by ensuring that charging is accessible not only within urban centers but also along key intercity routes that support long-distance travel.

By prioritising locations with high traffic flow and national importance, EVIQ has created a backbone infrastructure that allows EV users to travel confidently between cities, supporting both daily commuting and cross-country journeys. This network has transformed charging from a perceived limitation into a reliable service, laying the foundation for broader EV adoption.

Beyond enabling mobility, EVIQ's infrastructure supports national sustainability goals by reducing transport emissions, encouraging cleaner vehicle choices, and supporting economic diversification.

As the EV market continues to grow, EVIQ's early and decisive investment in fast-charging infrastructure positions it as a cornerstone of Saudi Arabia's emerging electric mobility ecosystem.

Laying the Foundation

50	**High-power EV charging stations installed by EVIQ over the past two years**
6	**Major cities where EVIQ has installed stations, including Riyadh, Jeddah and Dammam**
4	**Highways with EVIQ charging stations, including Jeddah-Madinah, Riyadh-Dammam and Riyadh-Qassim**

Source: EVIQ

One of the most promising breakthroughs comes from BYD, which in 2025 unveiled a "Megawatt Flash Charging" system on its Super e-Platform, capable of delivering up to 1,000kW of power[12]. Under ideal conditions, a compatible EV can regain approximately 400 km of range in as little as five minutes. Though this ultra-fast charging technology is currently being piloted in the UAE, it offers a compelling blueprint for Saudi Arabia.

Despite barriers, the readiness to transition is strong. 47% of respondents expect to purchase an NEV in the next 1-3 years, 33% within one year, and only 13% see their purchase occurring beyond three years. Meanwhile, brand consideration shows that established international brands are currently dominating but significant opportunities exist for others to win over consumers through performance, value, and service.

Japanese brands lead at 30%, followed by American (19%), European (16%), South Korean (13%), Chinese (11%), and local brands (6%). The relatively low share for domestic carmakers indicates that there is room to build trust, awareness, and reputation.

With intent and market reality clashing, there is a need to accelerate investment in affordable pricing models, faster and more abundant charging options, reliable service and spare-parts networks, and consumer education to build confidence in long-term NEV ownership. With the right interventions, Saudi consumers' interest in NEVs could translate into mainstream adoption.

Brand Preferences

"Which New Energy Vehicle (NEV) brand would you most consider purchasing?"

30%
Japanese Brands

19%
American Brands

16%
European Brands

13%
South Korean Brands

11%
Chinese Brands

6%
Local (Saudi) Brands

4%
Don't Know/No Preference

Source: Al-Futtaim Future of Mobility in Saudi Arabia Survey; August 2025

Localising Automotive Supply Chains

With billions of dollars being poured into infrastructure, cutting-edge technology, and supply chain development, Saudi Arabia is focused on creating a comprehensive NEV ecosystem that nurtures manufacturing and attracts international investment.

Local manufacturing is seen as a long-term economic anchor, with the goal of not only making EVs cheaper but to embed high-value industrial capabilities, create employment and strengthen national supply chains.

In November 2022, Crown Prince Mohammed bin Salman launched Ceer, the Kingdom's first domestic EV brand, set to release its first cars in Q4 2026 from its SAR 5 billion (USD 1.3 billion) complex. Meanwhile, PIF-backed Lucid Motors opened its first international factory, AMP-2, in King Abdullah Economic City (KAEC) in September 2023, primarily targeting exports. AMP-2 has begun semi-knocked down (SKD) assembly and is expected to have an annual capacity of 5,000 cars, with plans to transition it to a complete build unit (CBU) production with an additional annual capacity of 150,000 cars[13].

Meanwhile, Hyundai Motor Manufacturing Middle East (a JV between PIF and Hyundai Motor Company) is constructing its first Middle East facility in the King Salman Automotive Cluster in KAEC, aiming to deliver its first vehicle by Q4 2026 and an annual production of 50,000 vehicles (both ICE and NEV).

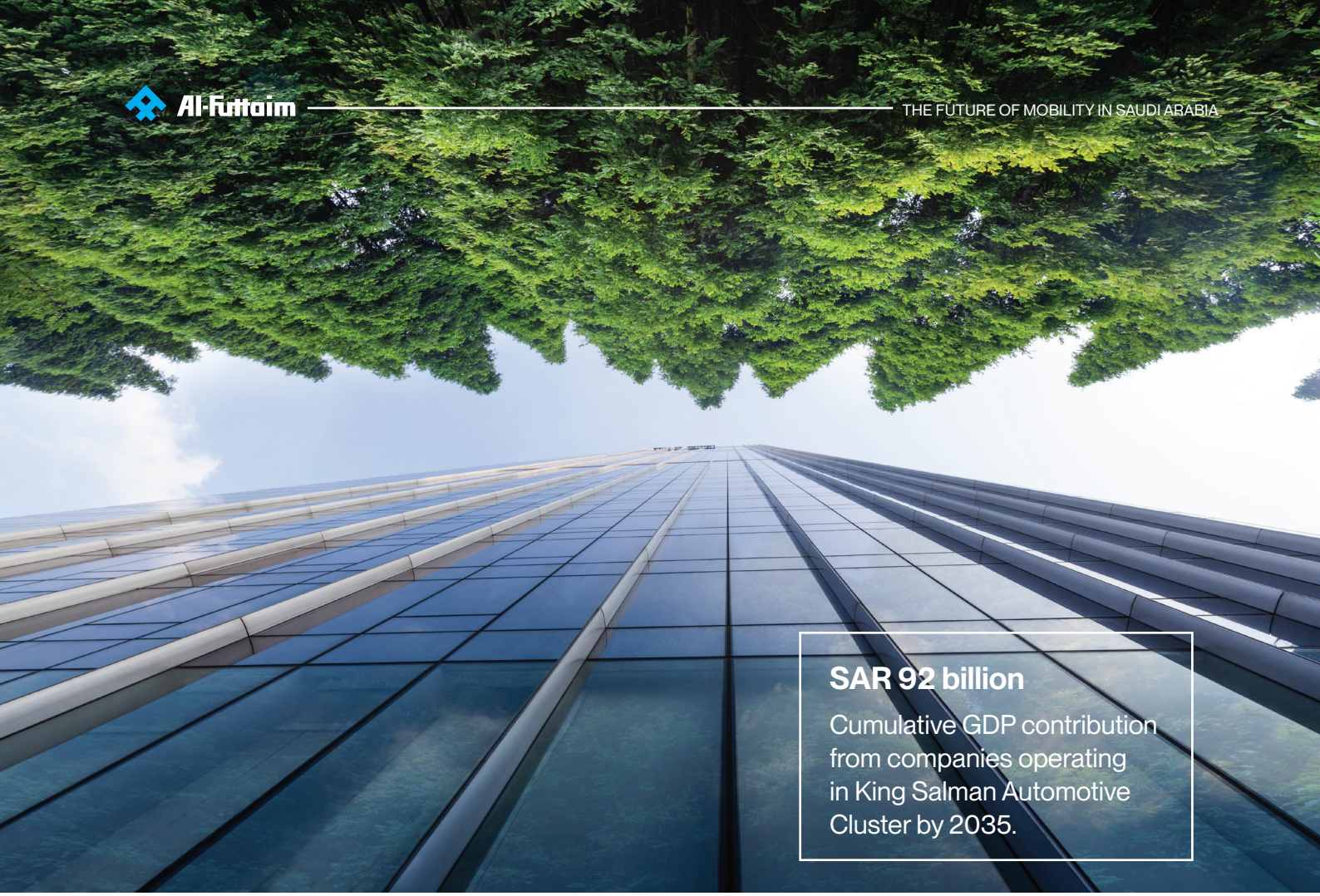
However, reaching global price competitiveness will take time. China's target output of 32 million automobiles annually (of which 15.5 million are NEVs) demonstrates the scale advantage more established markets benefit from[14].

In comparison, the Kingdom is aiming to manufacture around 350,000 vehicles (both ICE and NEV) per annum by 2030 through Lucid, Ceer and Hyundai, and remains one of the world's largest importers of cars[15]. With a 5% import tariff, many international OEMs can still produce more cheaply abroad and ship at volume to the Kingdom, making localisation challenging without a clearer business case.

Industry representatives at the roundtable underscored that predictable policies, commercially viable conditions and long-term protection are critical to unlocking major investment decisions. Encouragingly, momentum is building. Suppliers in seating, stamping, trims and EV components are entering the Kingdom. Saudi Arabia's global positioning through giga-projects such as NEOM has changed investor perceptions, with interest increasingly inbound rather than government-driven. Executives highlighted that interest is coming from Italy, the US and China, with firms eager to anchor their operations inside the Kingdom.

Participants also noted that multiple suppliers serving the Tesla ecosystem are assessing investment opportunities in the Kingdom. This includes tooling, plastics, and electronic subsystem suppliers that see Saudi Arabia as a future export base for the wider Middle East, Africa and Europe.

This is aligned with the Kingdom's ambitions to not only produce end-products but also items like car tyres, as evidenced by the large-scale Pirelli factory in KAEC targeting 3.5 million tyres annually.



SAR 92 billion

Cumulative GDP contribution from companies operating in King Salman Automotive Cluster by 2035.

Dealer network and after-sales evolution

The Kingdom's dealership landscape is also transforming rapidly. Chinese manufacturers such as BYD are scaling aggressively across major and secondary cities. The expansion is centred less on immediate sales and more on building consumer familiarity.

Other OEMs are also expanding footprints to meet rising demand. The expectation is that by 2026, Saudi Arabia will host one of the region's largest networks of NEV-focused retail and service sites.

Roundtable participants consistently emphasised that after-sales capability may matter more to consumers than upfront incentives. For many first-time EV buyers, the assurance of service centre coverage, spare parts availability and reliable technician support is central to trust. As one executive noted, until the Kingdom reaches mass adoption, after-sales remains a "bridge of confidence" that shapes market behaviour.

This emphasis is also driving investment in battery-repair hubs, mobile service fleets and predictive maintenance tools powered by telematics.

Localising skills

Roundtable experts agreed that long-term mobility ambitions can only be realised through consistent investment in technical talent. Sourcing specialists who can install and maintain advanced charging infrastructure is a pressing challenge. Skills in high-voltage systems, DC charger installation and transformer management are also still relatively scarce in the Kingdom, creating a reliance on overseas expertise.

Participants stressed that building this capability is a generational project rather than a short programme. They also underlined the need for stronger public-private collaboration to accelerate skills development, with academic institutions playing a more active role. BYD noted that success will require coordinated national orchestration, new training pathways and a mindset shift as the automotive workforce transitions from ICE to electric technologies.

Case Study

Upskilling & Training

Al-Futtaim Automotive Boosts NEV Readiness Through Globally-Certified Training

As Saudi Arabia advances its New Energy Vehicle (NEV) ambitions under Vision 2030, the availability of skilled talent has become as critical as vehicles and charging infrastructure. For NEVs to scale, consumers must trust that sales, servicing and safety standards are in place. Al-Futtaim Automotive has addressed this challenge by embedding NEV capability building at the core of its workforce strategy, through its Automotive Talent Centre.

All NEV training and certification pathways are aligned with the Institute of the Motor Industry (IMI), the professional body for individuals working across the global automotive sector. Founded in 1920, IMI sets international professional standards and qualifications for automotive roles worldwide.

Al-Futtaim Automotive is IMI's largest partner outside the UK, reflecting the scale and depth of its commitment to skills development and global best practice.

EV safety and awareness training is mandatory for all customer-facing and operational staff, embedding a strong safety culture across the organisation. For workshop teams, progressive IMI-aligned technical certification ensures technicians are qualified to diagnose, service and repair high-voltage NEVs to international standards.

In Saudi Arabia, this structured approach is already supporting market readiness. More than 100 non-technical associates have completed EV safety and awareness training, ensuring that NEV handling standards extend beyond workshops. In parallel, over 100 technicians are planned to progress through advanced IMI-aligned EV technical certification, strengthening local service capability.

Across all markets, more than 3,200 associates have completed EV training, demonstrating how scalable, standards-based learning can accelerate NEV adoption. By investing early in people, not just products, Al-Futtaim Automotive is helping create the service confidence, safety assurance and local expertise required to support long-term NEV growth in Saudi Arabia.

Boosting Market Readiness

3,200	**Associates that have completed EV training across all markets**
100	**Non-technical associates that have completed EV safety and awareness training**
100	**Technicians planned to progress through advanced IMI-aligned EV technical certifications**

Source: Al-Futtaim Automotive

Possible Scenarios for Saudi NEV Market Development

Scenario 1: Accelerated Take-Off

Under this scenario, local production ramps up quickly, supported by competitive manufacturing, falling battery costs, and new ownership models such as battery-leasing or subscription-based plans.

If local manufacturers in Saudi achieve price parity or near-parity with ICE vehicles, affordability will become a rapid reality. Complemented by well-distributed charging infrastructure, accessible ownership models, and innovations such as Battery-as-a-Service (BaaS), EV adoption could surge.

Under this accelerated take-off pathway, Saudi could see a sharp uptick in EV market share within a few years, especially in urban and peri-urban areas where charging infrastructure is dense.

Scenario 2: Cautious Uptake

In this scenario, charging infrastructure grows steadily and public familiarity increases, but price remains a constraint for a sizeable segment of buyers. EV adoption progresses gradually; uptake is stronger among early adopters and fleet operators rather than broad mass-market penetration.

Consumers may lean on long trial periods, renting EVs or using them for secondary cars rather than primary vehicles. As charging networks become more visible and after-sales services improve, confidence builds but widespread adoption remains limited until battery costs fall further or new financial models (leasing, battery subscription) become more competitive.

Scenario 3: Delayed Momentum

Under a more conservative outcome, regulatory delays, supply-chain disruptions or slow localisation could hamper price reductions.

Charging infrastructure might expand more slowly than needed and public campaigns may lack reach. In this scenario, EV adoption remains confined to niche segments : expatriates, higher-income buyers, and corporate fleets.

Without strong incentives or competitive pricing, many consumers may stick with familiar ICE vehicles.

The transition could stall, leaving EV adoption far below the ambitions set out under national goals.

To realise the accelerated take-off scenario, stakeholders, including government, manufacturers, to infrastructure providers, must deliver on multiple fronts:

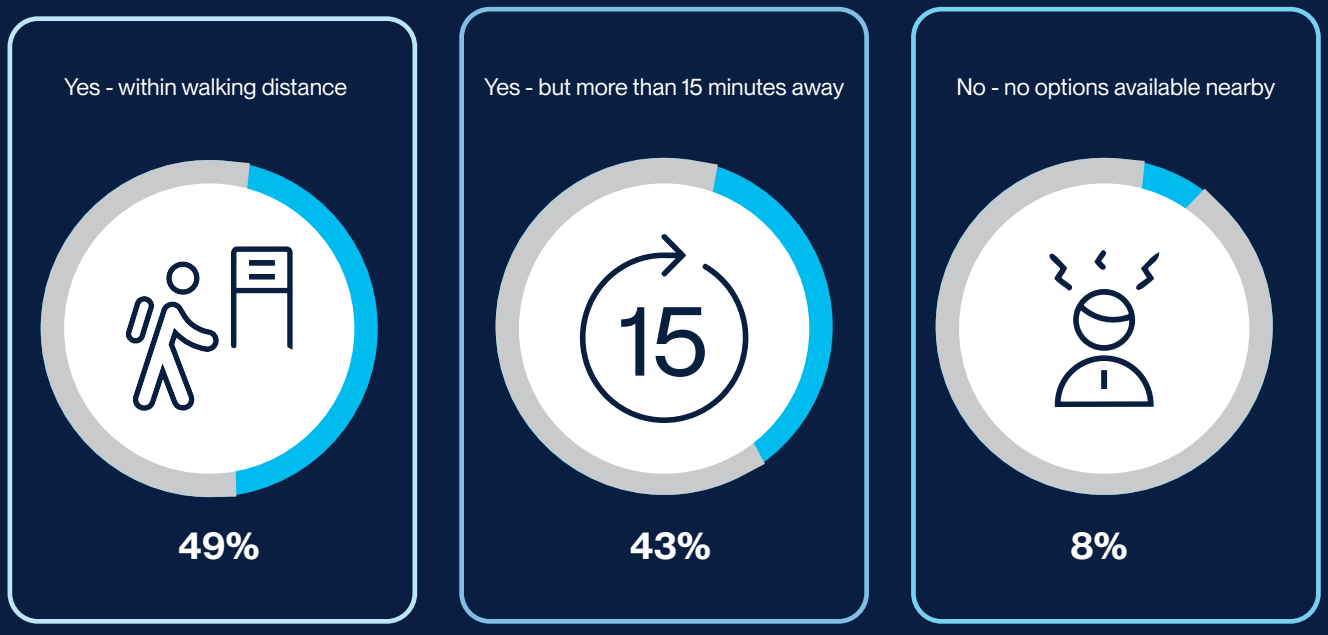
- Rapidly expand public charging infrastructure and ensure ease of access across cities and highways.
- Enable and promote innovative ownership and financing models, such as battery leasing[17] or subscription services.
- Offer transparent, consumer-oriented education and marketing to address concerns around cost, charging, and maintenance.
- Support local manufacturing to leverage economies of scale, strengthen supply chains and reduce dependency on imports, enabling more competitive pricing.

Mass Transit Continues to Build

While access to public transport in Saudi Arabia is improving, usage still lags behind. The Future of Mobility in Saudi Arabia survey shows that 49% of respondents live within walking distance of a mass transit stop, but regular ridership remains low.

Access to Public Transport

**Do you have convenient access to mass transportation in your area of Saudi Arabia?"*



Source: Al-Futtaim Future of Mobility in Saudi Arabia Survey; August 2025

The barriers are largely experience driven. Respondents point to limited route coverage, longer travel times compared with cars, and operational issues such as crowding, delays, safety and overall comfort as key deterrents. More than a third agree that integrating public transport with other mobility modes is critical.

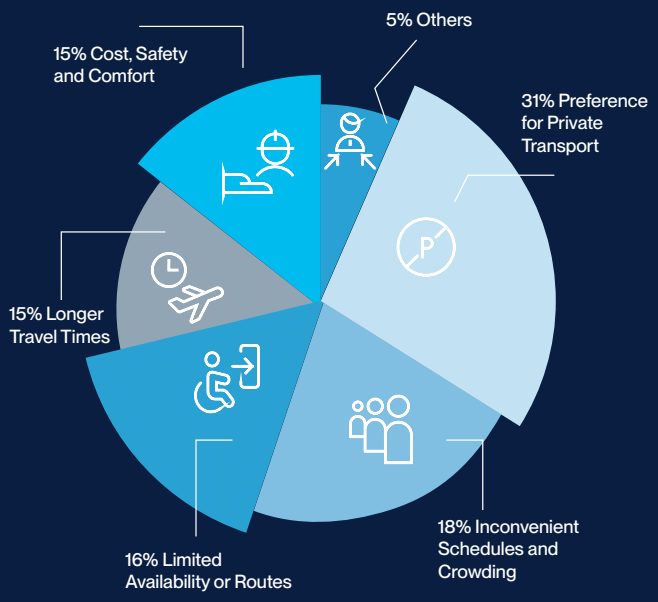
At the same time, the appetite for modernised systems is strong. Nearly four in ten survey respondents cited fully electric public transport as the most exciting future mobility trend, signalling a clear public desire for cleaner and more technologically advanced options. Together, these findings show a major opportunity if service quality and reliability improve.

These insights were echoed by experts at the Al-Futtaim industry roundtable, who emphasised that Saudi Arabia's next leap in mobility will depend not only on expanding public transport, but on connecting it effectively with flexible first- and last-mile solutions. They highlighted that the success of the Riyadh Metro has already demonstrated how perceptions can change when high quality services are introduced. Earlier perceptions suggested limited local appetite for mass transit. Yet since the metro's launch, visible increases in Saudi ridership have disproved these expectations. Participants agreed that when services are convenient, predictable and safe, people will use them.

A key theme emerging from the discussion was that integration matters as much as infrastructure. True multi-modal mobility requires more than metro lines and bus networks. It demands a system where public transport, ride hailing, micromobility options and on-demand shuttles function as one connected ecosystem

Barriers to Using Public Transport

"What is your primary reason for not using mass transportation more frequently?"



Source: Al-Futtaim Future of Mobility in Saudi Arabia Survey; August 2025

For consumers, this means being able to plan, book and pay for end-to-end journeys through simple digital platforms rather than navigating separate operators. Experts noted that strengthening first- and last-mile connectivity is often more effective than simply building additional infrastructure. A reliable feeder network expands the catchment area of each station, reduces dependence on private cars and supports more inclusive access for communities.

For Saudi Arabia, the path forward is clear. Enhancing route density, improving reliability and comfort, and integrating mobility options through unified digital platforms will be critical to converting public interest into sustained public transport use. As the Kingdom continues to invest in sustainable mobility, ensuring that public transport is easy, safe and genuinely convenient, will be central to achieving the shift away from private car dependence and towards a more efficient, inclusive and future ready mobility system.

Emerging Technologies Shaping Saudi Mobility

Saudi Arabia's mobility landscape is entering a period of rapid transformation, shaped not only by technology and policy but also by the strong enthusiasm of consumers who are ready to embrace new ways of moving.

Findings from the Future of Mobility in Saudi Arabia survey show a population that is increasingly open to innovation, particularly in electric public transport, autonomous vehicles and subscription-based mobility models.

This readiness offers a clear signal to government, industry and city planners: a market is primed for change, but where success depends on aligning investments, regulations and user experience with consumer expectations.

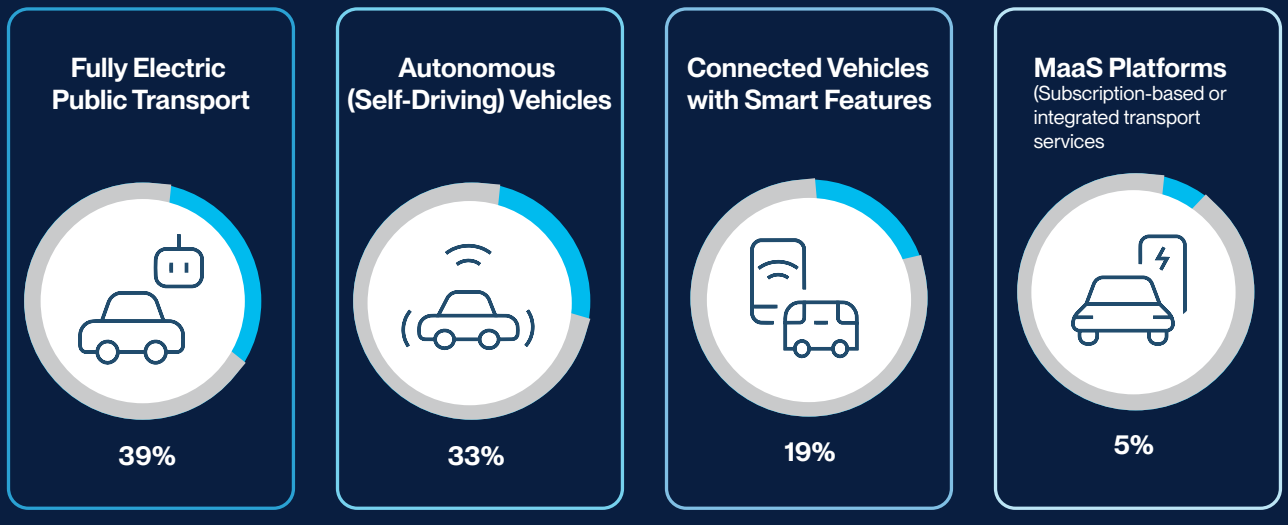
Electric public transport stands out as the most exciting trend for 39% of the respondents, reflecting a growing appetite for cleaner, more efficient and reliable alternatives to private vehicles.

For policymakers, this represents a strong mandate to accelerate the rollout of electric buses, upgrade transit fleets and ensure that new urban developments are designed with electrified mobility at their core.

Beyond simply deploying vehicles, delivering high-quality passenger experience will be essential. Reliability, comfort, frequency and seamless integration with first- and last-mile services must

Future Mobility Trends

"Which of the following future mobility trends excites you the most?"



Source: Al-Futtaim Future of Mobility in Saudi Arabia Survey; August 2025

advance in parallel to achieve meaningful adoption. As pavements and public spaces improve, micro-mobility options like scooters and bikes will become more viable and integrated into the wider mobility ecosystem.

Autonomous vehicles (AVs) also attract keen interest, with 33% of Saudi consumers selecting them as the trend that excites them most. Despite a global climate where public confidence in self-driving cars can be mixed, Saudi respondents show notable openness. In fact, three out of four say they are likely to use an AV for daily commuting or travel. This suggests that the groundwork for future adoption is already strong, but several conditions will need to be met.

Clear regulatory frameworks, rigorous safety standards, controlled pilot zones and transparent communication around testing will play a critical role in building trust. Industry players will also need to focus on user education and opportunities for hands-on trials that help demystify autonomous technology.

Across all emerging mobility trends, one theme is consistent: consumer enthusiasm is high, but uptake will depend on how well industry and government address concerns around cost, safety, access and reliability. The Kingdom's investments in electrification, smart infrastructure and autonomous technology are timely, yet their full impact will only be realised through deliberate collaboration and continued focus on the end user. Bringing consumers into the journey through education, pilot programmes, and opportunities for hands on engagement will be essential in turning optimism into everyday mobility choices.

When it comes to shared mobility and subscription-based models, the survey points to an equally promising landscape. 79% of respondents say they would be likely to subscribe to a Mobility-as-a-Service (MaaS) platform, and 72% say they would consider using shared mobility services instead of owning a personal car. These are significant findings in a market historically shaped by high private car ownership.

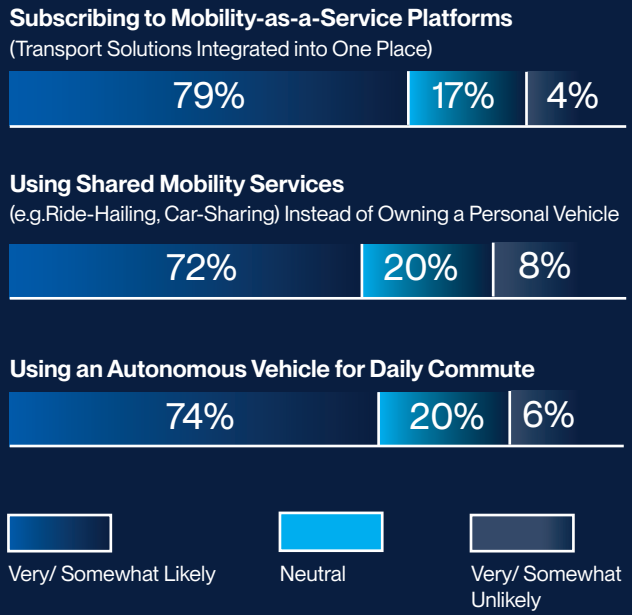
From intent to action

As cities work to reduce congestion and improve liveability, this shift in mindset unlocks new opportunities. To translate intention into behaviour, operators will need to deliver dependable availability, transparent pricing and convenient digital platforms that connect public transport, ride hailing, micromobility and car-sharing into a single, user-centred ecosystem.

Institutional support is helping accelerate innovation. The King Abdullah University for Science and Technology's (KAUST)[18] Future Mobility Sandbox programme in partnership with the Saudi Ministry of Transportation & Logistics Services (MoTLS) provides a controlled environment to pilot advanced multi-modal technologies such as autonomous systems, creating real-life conditions for innovators.

Mobility Solutions

"How do you feel about using the following future mobility options?"



Source: Al-Futtaim Future of Mobility in Saudi Arabia Survey; August 2025

Case Study

Future Development

Nudging Towards Integrated, Multi-Modal Mobility

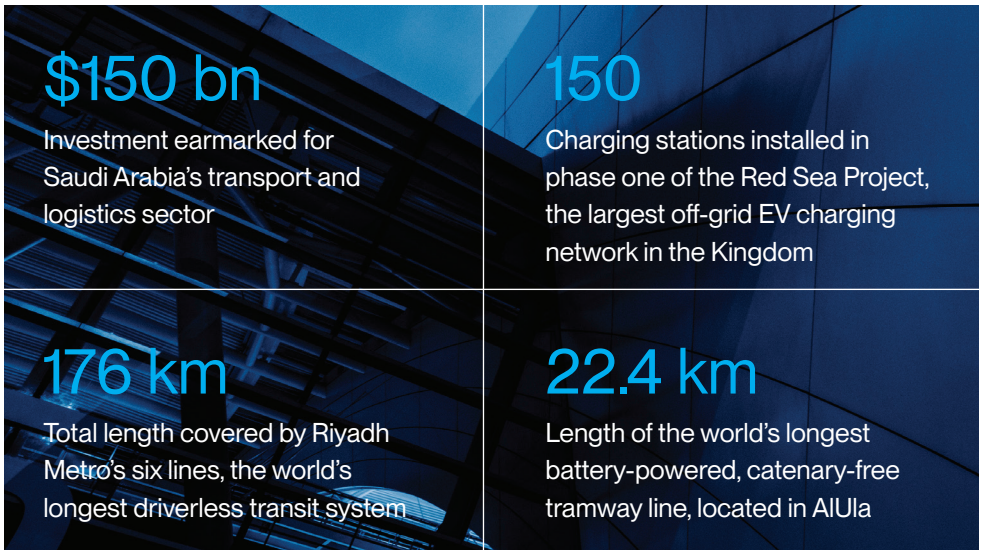
Since the launch of Vision 2030, Buro Happold has supported many of the Kingdom's most ambitious mobility programmes, from giga-projects to regional transport strategies, helping shift Saudi cities from car-dominated environments toward integrated, human-centred, multi-modal systems.

Nowhere is this transition more visible than in Riyadh. The Riyadh Metro, one of the world's largest urban transit schemes, has already begun reshaping travel patterns by providing fast, predictable journey times in corridors once plagued by congestion. But the real change is happening in the layers around the metro: a redesigned bus network with more than 3,000 stops, upgraded interchange hubs that reduce transfer times, on-street managed parking, and citywide first- and last-mile enhancements that make walking and cycling more viable in a hot-desert climate. Digital platforms now integrate real-time information, parking management, and demand-responsive services—tangible interventions that make public transport intuitive for residents using it for the first time.

This shift is echoed across the Kingdom. Giga-projects are embedding mobility into the fabric of their masterplans in ways that were rare only a decade ago. Diriyah has delivered one of the region's largest pedestrianised districts, with shaded routes and mobility hubs enabling car-free movement across heritage areas. The Red Sea Project has adopted a renewable-energy-powered mobility network, including electric vessel fleets and autonomous shuttles designed to minimise ecological impact. AlUla integrates low-carbon transit with heritage protection, using discreet mobility corridors, unified wayfinding, and controlled access systems to safeguard archaeological sites while improving visitor circulation.

Taken together these developments and others show a Kingdom rewriting the assumptions that shaped its cities for decades. The true significance lies not just in new transit lines or walkable streets, but in the willingness to challenge car dependency and design urban environments around people.

Accelerating Progress



Source: Buro Happold

Consumer Confidence Backs Progress

Saudi Arabia's mobility transition is moving quickly, and one of the clearest signals of its direction comes from the people who will ultimately shape its success: consumers.

Findings from the Future of Mobility in Saudi Arabia survey show a public that is paying close attention to the Kingdom's plans and forming clear views about what progress looks like in practical terms.

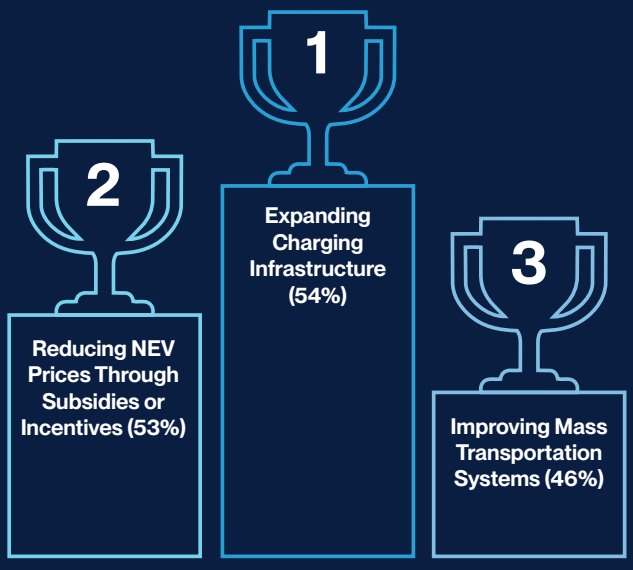
A strong majority of respondents expressed confidence in the country's mobility agenda. 86% agreed that Saudi Arabia is on track to become a global leader in sustainable and innovative mobility solutions. 85% felt that the Kingdom is addressing consumer needs and expectations in ways that will support the adoption of future mobility technologies. A further 84% said that the necessary infrastructure is being put in place. These findings suggest trust in the overall vision and recognition of the efforts already underway across policy, planning and investment.

However, confidence in the direction of travel does not mean consumers are passive observers.

The survey results show that people have a clear sense of what they want prioritised to bring the mobility vision closer to everyday experience. When asked about the most important steps the country should take, just over half highlighted the need to expand charging infrastructure for new energy vehicles. A similar share emphasised reducing NEV prices through targeted incentives or subsidies, pointing to cost as a defining barrier for many potential adopters.

Mandate for Action

"What steps should Saudi Arabia prioritise to achieve its vision for the future of mobility? Select all that apply."



Other: Encouraging Innovation in Mobility Technologies (46%); Strengthening Safety and Regulatory Standards (44%); Educating Consumers about Future Mobility Options (42%); Partnering with Global Mobility Companies (36%).

Source: Al-Futtaim Future of Mobility in Saudi Arabia Survey; August 2025

Improvements to the wider transport ecosystem also feature prominently. 46% of respondents called for stronger mass transportation systems, reflecting growing expectations for alternatives to private car dependency. Another 46% prioritised continued innovation in mobility technologies, while 44% stressed the importance of enhanced safety and regulatory standards as the market evolves.

Consumer education also emerged as a meaningful priority, with 42% saying that greater awareness and information about future mobility options would support more confident decision-making. This aligns with broader discussions across the sector about the need for practical guidance, trial experiences and clear communication, particularly as new technologies become more prominent on Saudi roads.

There is also clear support for international collaboration. 36% of respondents said that partnering with global mobility companies should remain a priority, suggesting that people recognise the value of international expertise and technology transfer as the sector scales.

Together, these insights paint a picture of a public that is both supportive and engaged. Consumers believe in the Kingdom's mobility ambitions, but they also want to see practical advancements that make the transition feel accessible, affordable and reliable in everyday life. Their expectations revolve around the fundamentals: a robust charging network, better affordability, reliable public transport, clear regulations and trusted sources of information.

For policymakers and industry leaders, the message is straightforward. The foundations are strong and public sentiment is largely aligned with national objectives. The next phase requires accelerating the elements that directly touch the consumer experience. If progress continues in this direction, Saudi Arabia's mobility transformation will be shaped not only by strategy and investment, but by the growing confidence and participation of the people who stand to benefit most.

Case Study

Building the Foundation

King Salman Automotive Cluster Builds Saudi Arabia's Manufacturing Backbone

Saudi Arabia's ambition to localise its automotive industry is being anchored by the King Salman Automotive Cluster in King Abdullah Economic City (KAEC). The Cluster represents a critical step in translating national industrial policy into large-scale manufacturing capability, positioning the Kingdom as a competitive automotive production and export hub. Its strategic location provides direct access to King Abdullah Port, one of the region's most advanced and a key gateway to global trade routes.

By 2035, vehicle production from OEMs based within the Cluster is expected to exceed 350,000 units annually. Several major localisation programmes have already been secured, creating early momentum and industrial credibility, with Ceer, Lucid and Hyundai among the anchor brands.

The Cluster is being designed to accommodate location-critical suppliers required to support automotive manufacturing at scale. This integrated approach aims to reduce reliance on imports, improve cost competitiveness and strengthen supply chain resilience, while enabling technology transfer and capability development within the Kingdom.

A wider ecosystem of infrastructure and services is also being developed to support industrial activity. MASARAT Mobility Park, led by TASARU (PIF) in partnership with Zamil Group Real Estate, Alkhorayef Sons and Dar Al Himmah, will deliver more than two million square metres of space dedicated to automotive trading, logistics and ready-made manufacturing facilities.

Operational capability is being embedded from an early stage. PAC Group has signed a memorandum of understanding to provide industrial services, including plant maintenance, further strengthening operational readiness. In parallel, talent development is being addressed through the establishment of the National Automotive and Vehicles Academy (NAVA) at KAEC, supporting the development of a skilled Saudi automotive workforce.

Bold Ambitions

SAR 90 bn+	**Cumulative GDP contribution of the King Salman Automotive Cluster (KAEC) by 2035**
350,000+	**Vehicle units produced annually by announced OEM projects based within KAEC by 2035**
1,200	**Saudi nationals expected to be trained and upskilled under NAVA across a three-year period**

Source: Public announcements, Roland Berger

Recommendations to Strengthen Mobility Transition

Saudi Arabia has already made meaningful progress in building the foundations of an advanced mobility ecosystem. Major investments in charging infrastructure, national standards such as CCS2, and growing interest from global manufacturers have signalled to the world that the Kingdom is serious about shaping a cleaner, smarter and more competitive transport future. The next phase will require coordinated action across government, industry and investors to unlock scale and create a truly seamless mobility experience.

The roundtable surfaced a shared set of principles for Saudi Arabia's EV transition. Affordability, charging certainty and consumer trust will determine the pace of adoption. Local manufacturing must act as the backbone of long-term competitiveness, supported by clear and balanced incentives. A wider ecosystem of suppliers, charging providers and service networks is beginning to take shape, but sustained confidence will be the decisive factor.

Ultimately, the transition will not be driven by technology alone. It will be shaped by whether Saudi consumers see EVs as practical, reliable and aligned with their daily lives. The Kingdom's progress is already significant, and with the right interventions, it can build one of the most competitive and future-ready mobility markets in the world.

Government Must Set the Rules for Future-Ready Mobility Systems

Clear and unified governance will be central to accelerating the transition. Establishing a single authority dedicated to autonomous and electric mobility would help streamline approvals, reduce administrative overlap and give investors confidence in long-term policy direction.

Countries such as Singapore offer relevant examples. The Land Transport Authority combines regulation, planning and standards under one institution, allowing for consistent nationwide EV and AV rollout.

Saudi Arabia can build on its strong start by expanding incentives that encourage localisation across the full value chain. Phased enablers, such as reduced duties on key components, access to industrial zones, or fast-track permitting, would help place more manufacturing activity within the Kingdom.

OEMs Must Win Consumer Trust Through Engagement and Service Excellence

Manufacturers entering the Saudi market will benefit from investing early in discovery centres, long test-drive cycles and visible after-sales support networks. Leading brands in Europe, such as Volkswagen and Mercedes-Benz, have used hands-on discovery hubs to demystify electric mobility and reassure new customers.

Saudi consumers are increasingly curious about EVs and extended test-drive access has proven internationally to be one of the most effective ways of converting interest into adoption.
Localising service centres early will also build trust, reduce maintenance wait times and signal long-term commitment to the market.

Developers and Urban Planners Must Design Cities That Make New Mobility Easy to Use

Urban development will play a decisive role in shaping how people adopt new mobility options. Integrating charging infrastructure early in masterplans reduces retrofitting costs and makes EV readiness a natural part of the built environment.

Strengthening walkability, cycling paths and micro-mobility links can also encourage more sustainable travel choices. Saudi Arabia's own giga-projects are already reimagining mobility from the ground up, offering an opportunity to embed global best practice on a national scale.

Charging Operators Must Build Networks Where Demand Will be Highest

Saudi Arabia's charging strategy is advancing quickly, guided by national maps that prioritise Riyadh, Jeddah, the Eastern Province and major highways. Operators can amplify this progress by focusing deployment in megacities and high-traffic corridors, where utilisation is likely to be strongest. Transparent pricing, real-time availability and accessible digital tools will be crucial.

Investors Must Back the Next Wave of Mobility Innovation

Growth in electric mobility will open investment opportunities across financing models, battery-as-a-service offerings and distributed charging networks across the Kingdom.

Saudi Arabia's strong financial sector and appetite for innovation make it well placed to pilot similar models, particularly as local manufacturing expands.

Appendix

Survey Methodology

To inform strategic decision-making in Saudi Arabia's evolving mobility landscape, Al-Futtaim commissioned a consumer survey to capture insights into perceptions, expectations and barriers related to NEVs, mass transportation and emerging mobility solutions. The research aimed to identify areas of alignment and disconnect between the Kingdom's Vision 2030 mobility ambitions and consumer realities.

The survey was conducted in collaboration with Burson and YouGov between 25-28 August 2025. A total of 1,007 respondents aged 18 to 45 across Saudi Arabia participated via an online, self-administered survey. The sample was designed to reflect a broad urban consumer base, with respondents primarily based in Riyadh (37%), Jeddah (25%), Makkah (9%) and Madinah (7%), alongside participants from other cities and regions (15%).

The respondent profile comprised 59% male and 40% female participants. By age, 42% were aged 27 to 35, 39% were aged 36 to 45, and 19% were aged 18 to 26.

In terms of monthly income, 46% reported earning between SAR 5,000 and SAR 20,000, 34% earned more than SAR 20,000, 15% earned up to SAR 5,000, and 5% preferred not to disclose their income.

The findings provide a consumer-led perspective on mobility readiness and adoption, offering insight into how different demographic groups perceive and engage with future mobility solutions in the Kingdom.

Global Examples: Innovative EV Ownership Models

In many countries, ownership models beyond the traditional purchase are gaining traction. One of the most promising options is Battery-as-a-Service, where drivers lease the battery separately from the vehicle. This business model is already well established in China[19]. For example, Nio's BaaS[20] programme allows customers to pay a monthly subscription for battery access and to swap discharged batteries in minutes at dedicated stations. By decoupling the battery from the car, Nio reduces the purchase price significantly, making EVs more financially accessible.

Across Europe and China, the BaaS market is expanding[21] rapidly. A recent report by Frost & Sullivan notes that the number of operational BaaS stations is expected to more than double to an estimated 8,585, from 3,800 currently. This model substantially reduces the financial burden of EV ownership, particularly for drivers who worry about battery degradation or long-term resale value.

In addition to BaaS, leasing and flexible financing models are emerging in mature EV markets. Automakers in the United States and Europe have introduced long-term leasing[22] and subscription schemes that bundle insurance, servicing, and battery maintenance. These models provide flexibility to customers and align well with evolving consumer behaviours.

Strategic Efforts to Boost EV Localisation

Tax relief for locally assembled EVs in Indonesia

The Indonesian government[23] offers a reduced VAT rate (1% instead of 11%) for EVs with at least 40% domestic content, along with zero import duty for manufacturers committing to local factories by 2026. This policy has attracted players such as Hyundai, Wuling and Neta to build or expand EV assembly and battery production infrastructure.

Thailand's flexible export-oriented production incentives

Under its revised EV policy, manufacturers in Thailand[24] can count exports of domestically produced EVs toward local production quotas. This flexibility has helped attract investments from major automakers, boosting the country's prospects as a regional EV manufacturing and export hub.

Strategic support mechanisms supercharge local supply chains in China

China remains the largest EV and NEV producer globally. Its combination of subsidies, tax breaks, charging infrastructure investments, and supply-chain development has enabled domestic automakers to scale rapidly[24]. Between 2009 and 2022, EV sales surged, and battery-electric vehicle output helped the country capture over 60% of global EV sales in 2023.

South Africa's manufacturing support package

In 2025, South Africa announced plans[26] to invest **ZAR 1 billion (USD 60 million)** to support domestic EV and battery production. The aim is to attract global OEMs and suppliers, reduce reliance on imports, and build a robust EV manufacturing ecosystem.

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Acknowledgements

We gratefully acknowledge the contributions of the participants in the Future of Mobility in Saudi Arabia Industry Roundtable, whose diverse perspectives and expertise helped shape the insights and recommendations presented in this white paper. We also extend our sincere thanks to additional contributors who provided expert input for this publication.

We are especially grateful to the following individuals for their invaluable insights.

Aftab Ahmed, Chief Advisor – Automotive & Mobility, National Industrial Development Center

Arvind CJ, Partner, Roland Berger

Dr. Ayman El-Hefnawi, GCC Representative, Regional Office of Arab States, UN-Habitat

Badr Khojandi, General Manager – Brand, BYD KSA, Al-Futtaim

Dr. Basma Al Buhairan, Managing Director, World Economic Forum (WEF) Centre for the Fourth Industrial Revolution in Saudi Arabia

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