Driving change - the future of sustainable heavy-duty trucks in the Middle East

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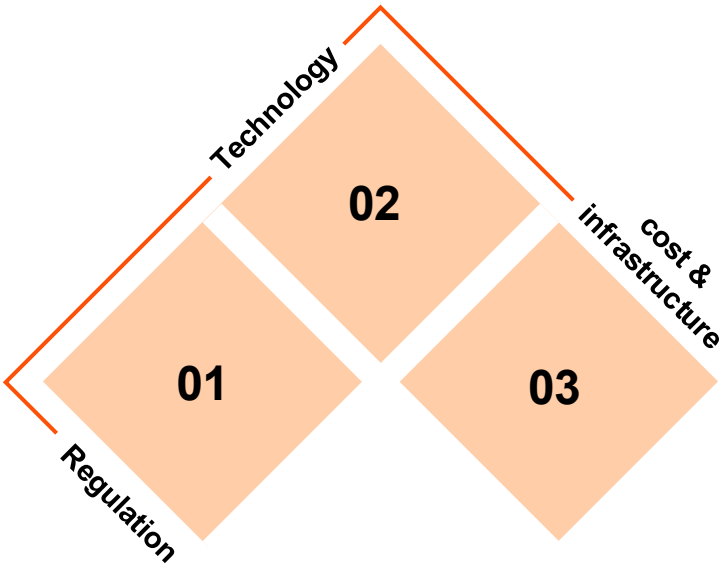
Executive summary

Transport is one of the fastest-growing sources of greenhouse gas (GHG) emissions globally, accounting for a quarter of total carbon emissions.[1] Nearly three-quarters of this originates from road vehicles, with medium- and heavy-duty vehicles (MHCVs) responsible for 40% of global CO2 emissions within the road transport sector.[2]

This disproportionate impact is primarily due to the heavy reliance of MHCVs on diesel fuel and their extensive usage in road transport. These figures are set to climb unless targeted interventions are adopted.

The Middle East, home to some of the highest per capita CO2 emissions globally, is now at a critical juncture with sustainability efforts in the transport and logistics sector gaining significant momentum. Ambitious commitments made by countries such as the UAE, Saudi Arabia, Qatar and other GCC countries include nationwide electrification targets to public-private partnerships for clean transport.

However, the region is still navigating challenges when it comes to charging infrastructure and regulatory incentives. The pathway to decarbonising road freight will be shaped by three main factors: regulation, technology and cost and infrastructure readiness.



1. **Regulatory frameworks will be central to driving adoption.** Globally, governments are combining incentives and restrictions to drive uptake of zero-emission vehicles (ZEVs) – from subsidies and tax breaks for trucks and infrastructure to road toll discounts. At the same time, tighter emissions standards, zero-emission procurement targets and bans on ICE trucks in specific zones are sending strong signals to industry. These measures are essential to make clean technologies competitive and reward early movers.
2. **Technology progress and cost reduction are just as vital.** For zero-emission trucks to succeed in medium- and heavy-duty segments, total cost of ownership (TCO) must keep falling – through lower upfront prices, better energy efficiency and reduced maintenance. Advances in batteries, fuel cells and drivetrains are already driving down costs, and continued innovation at scale will make them increasingly competitive with diesel.
3. **Supporting infrastructure is essential to scale zero-emission trucks.** This includes reliable charging networks for battery trucks and hydrogen refuelling for fuel-cell vehicles, especially along key road freight routes. Grid upgrades, depot charging and investment in logistics hubs will also be critical. Without this foundation, adoption could stall – even with strong policy and technology progress.

Momentum is already building, with global sales of electric trucks surged by 35% in 2023,[3] and zero-emission powertrains are set to gain ground in medium- and heavy-duty segments, led by the US, Europe and China. This paper outlines a roadmap to accelerate progress, highlighting the need to align policy, infrastructure and cost incentives for a successful transition.

02

Why sustainable road freight matters now

Momentum is already building. Global sales of electric trucks surged by 35% in 2023, and zero-emission powertrains are set to gain ground in medium- and heavy-duty segments, led by the US, Europe and China. This paper outlines a roadmap to accelerate progress, highlighting the need to align policy, infrastructure and cost incentives for a successful transition.

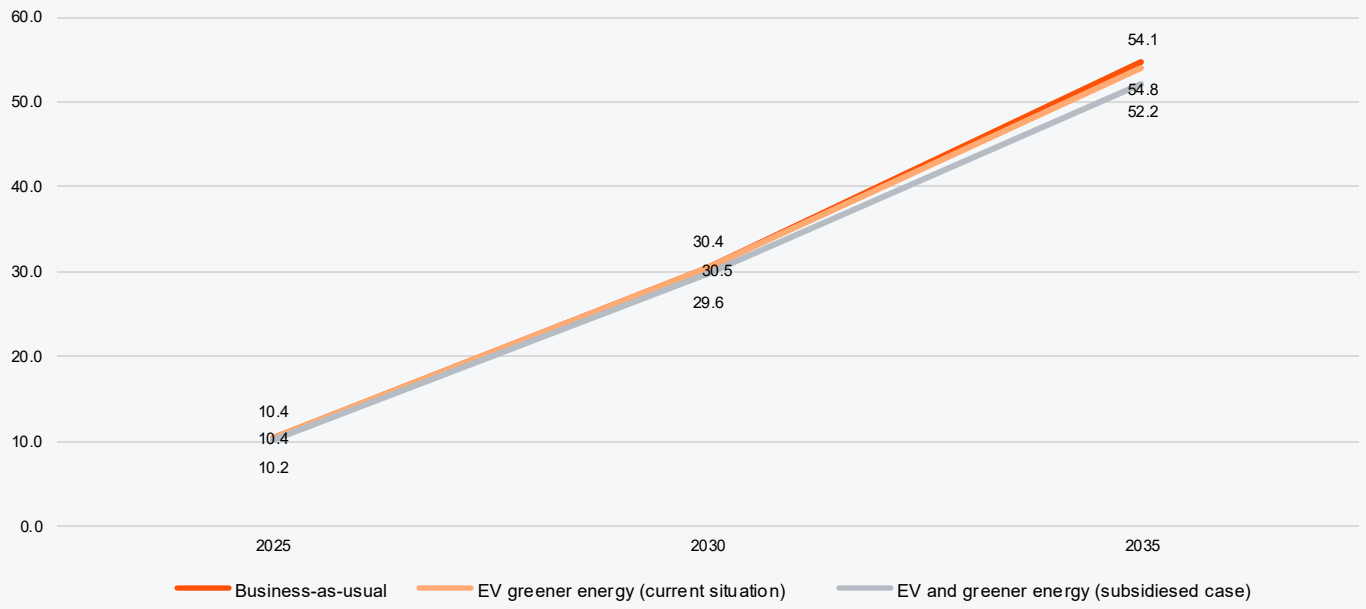
Sustainable road freight is now a strategic regional necessity for the Middle East. With GCC countries committing to net-zero targets, decarbonising heavy transport – one of the most emissions-intensive sectors – is essential. Without intervention, logistics emissions risk offsetting progress in other areas.

The shift to battery-electric and hydrogen fuel cell trucks offers a chance to rethink mobility and reshape the region's energy model. For economies built on hydrocarbons, road freight is both a challenge and an opportunity – a bridge between legacy systems and the cleaner, technology-led future outlined in Saudi Vision 2030, the UAE Net Zero by 2050, Qatar National Vision 2030 and vision programs of other GCC countries. Scaling zero-emission trucks can cut emissions while driving industrial innovation and diversification.

This transition must also balance the energy trilemma – affordability, reliability and sustainability. In a region rich in energy but under growing environmental pressure, electrifying road freight is one of the most powerful levers for cutting emissions without compromising cost or efficiency.

PwC Middle East and Trukker's analysis shows that with strong government action – including policy, regulation and incentives – emissions could fall by 4.7% by 2035. In a business-as-usual scenario, emissions drop just 1.3%, and the new vehicle fleet could emit over 54 million tonnes of CO_2. Decisive policies are, therefore, critical to delivering meaningful climate outcomes.

Figure 1: Forecast: Total annual CO2 emissions of cumulated new sales for KSA, UAE and Qatar (in Mn tons, until 2035)



Source: TruKKer and PwC Middle East analysis

A measurable climate return

Accelerating sustainable trucking offers significant, measurable climate benefits. PwC Middle East research shows that, under a government-led scenario, Saudi Arabia, the UAE and Qatar could avoid up to 2.6 million tonnes of CO_2 annually by 2035 – the equivalent of 2.6 years of Qatar's current road freight emissions.

These savings are especially important as transport emissions rise faster than in other sectors, driven by urban growth, trade and logistics.

Electrification delivers the strongest climate return. Battery electric trucks (BEVs) convert around 70% of energy into motion – far more than hydrogen fuel cell vehicles (26%) or synthetic fuels (13%). This efficiency means each unit of clean energy in BEVs cuts more emissions per kilometre, making them the most cost-effective decarbonisation option today.

Without incentives, emissions from new truck sales could exceed 54 million tonnes by 2035. Accelerated electrification could cut this by 4.7% or more, especially when combined with synthetic fuels and modal shifts. Among all technologies, BEVs offer the most efficient and climate-resilient path forward.

03

Transition at an embryonic stage

The GCC region is witnessing a gradual but promising shift towards overall electric mobility. EV sales in the GCC are projected to grow at a 40% compound annual growth rate (CAGR) through 2030, aided by supportive government policies, investment in charging infrastructure and rising environmental awareness.[4]

Yet for electric heavy-duty trucks, the transition is at an embryonic stage.

PwC and TruKKer's research across the UAE, Saudi Arabia and Qatar finds that electric heavy-duty truck availability in the GCC remains limited, especially in the crucial mid-weight segment (10–20 tonnes), hindering fleet diversification and slowing electrification. With only 15 zero-emission models available - 70% fewer than in Europe - and most internal combustion engine (ICE) vehicles being second-hand imports, the region has a lot of potential to expand the EV model availability by attracting OEMs, and tailor deployment strategies to accelerate sustainable road freight transformation.

Besides this, other challenges, include:

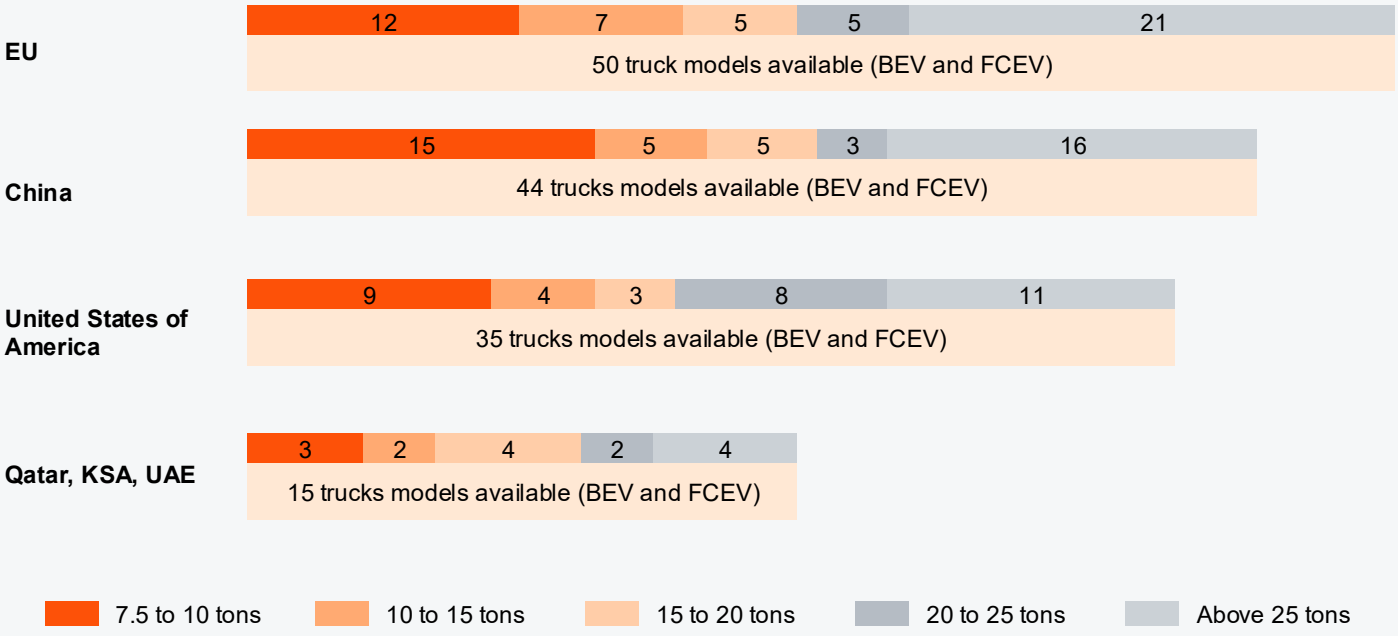
1 **High upfront costs of eTrucks and mature second-hand market for ICE trucks**

2 **Inadequate charging and hydrogen refuelling infrastructure**

3 **Low diesel prices, which distort the TCO (total cost of ownership) comparison**

4 **Absence of zero-emission vehicle sales targets in several markets**

Figure 2: Available BEV and FCEV heavy duty truck models in 2024



Source: TruKKer and PwC Middle East analysis

04

International best practices

Across the GCC, regulatory frameworks for zero-emission transport are still evolving. The UAE's updated Nationally Determined Contribution (NDC) introduces more stringent emission standards, including a shift to 10 parts per million (ppm) sulphur diesel, a significant reduction that lowers harmful pollutants and Euro 4 compliance for new vehicles, with a gradual transition toward Euro 5 and 6 standards. Pilot programmes like Green Diesel signal early interest in cleaner alternatives. However, to scale sustainable heavy-trucks across the sector, further development of cohesive and enforceable regulatory policies will be essential. A broader adoption of carbon credit mechanisms and fuel economy standards could help advance the regional transition to low-emission road freight.

Globally, the US, EU and China are setting the pace with mandates, incentives and infrastructure investment. These examples offer lessons for GCC countries designing their own frameworks.

01

United States:

Over US$1.4bn in grants for ZEV infrastructure; California's HVIP offers up to US$240K per vehicle in subsidies[5]

02

China:

Pioneered battery-swapping networks and fleet-level EV incentives; subsidies up to 50,000 CNY

03

Germany:

The KsNI programme covers up to 80% of fleet charging costs, though currently paused due to budget constraints[6]

04

Netherlands:

Purchase subsidies of EUR35,700 to EUR131,900 under the AanZET scheme, based on truck size and usage[7]

These models show how coordinated support – spanning regulation, finance and infrastructure can unlock zero-emission road freight at scale.

Source: TruKKer and PwC Middle East analysis

05

What would enable the shift?

1. Total cost of ownership (TCO)

TruKKer's study provides a comparative analysis of the Total Cost of Ownership (TCO) over a four-year period and 400,000 km for various truck types, including new and second-hand internal combustion engine (ICE) vehicles, battery electric vehicles (EVs) and fuel cell electric vehicles (FCEVs). The analysis is tailored to the GCC context, where most ICEs are second-hand imports from Europe.

Eight cost parameters have been used to calculate the TCO across different vehicle types. These include purchase price, energy costs, maintenance, insurance, depreciation, infrastructure investment, resale value and operational expenses. The study includes new FCEVs imported from China and EVs sourced from both Europe and China.

For a subsidised TCO scenario, PwC analysis indicates that purchase tax exemptions in select EU countries range from 25-30% on an average. We have considered 30% purchase subsidies on overall vehicle cost for our analysis.

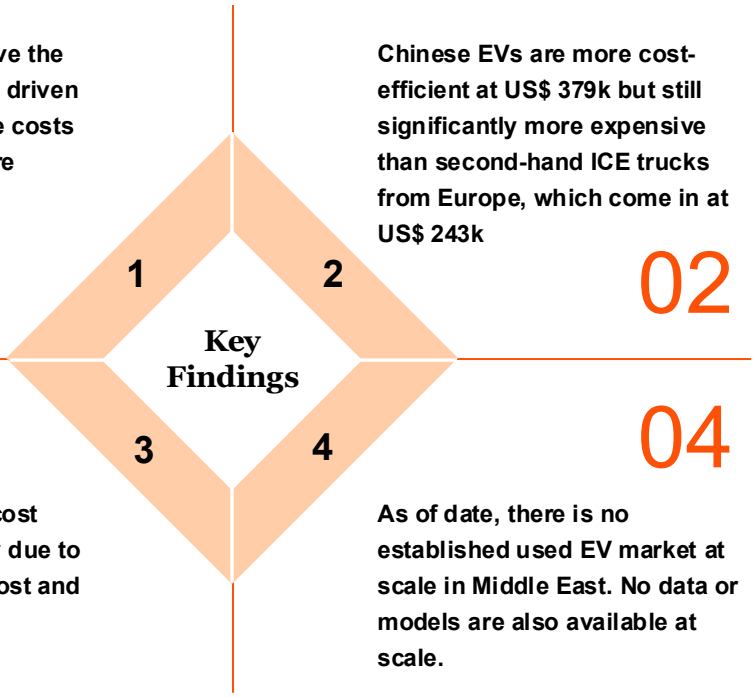
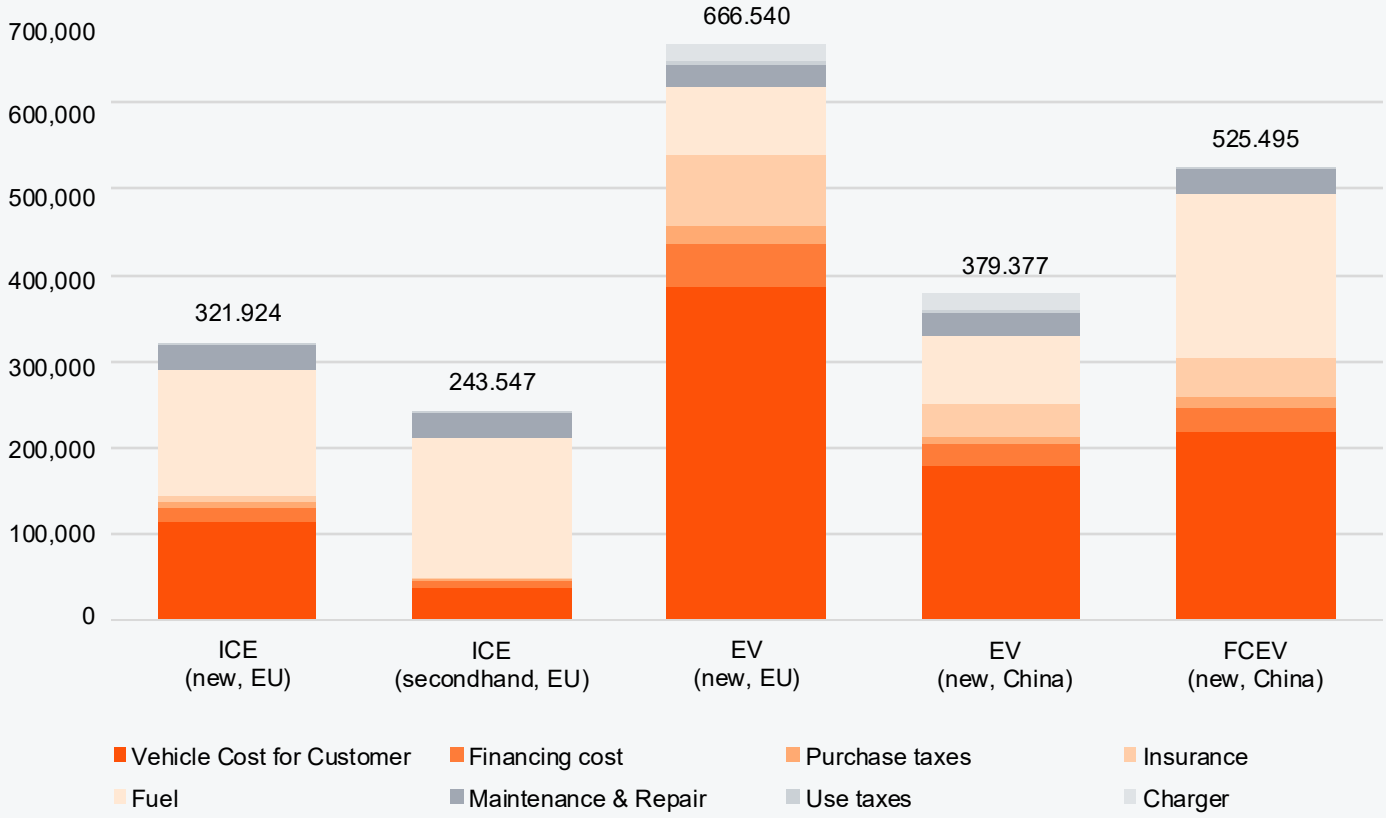


Figure 3: Total cost of ownership over four years and 400,000km in US$



Source: TruKKer and PwC Middle East analysis

Current TCO models suggest BEVs could reach cost parity in the region by 2030, driven by falling battery prices and the internalisation of CO_2 costs.

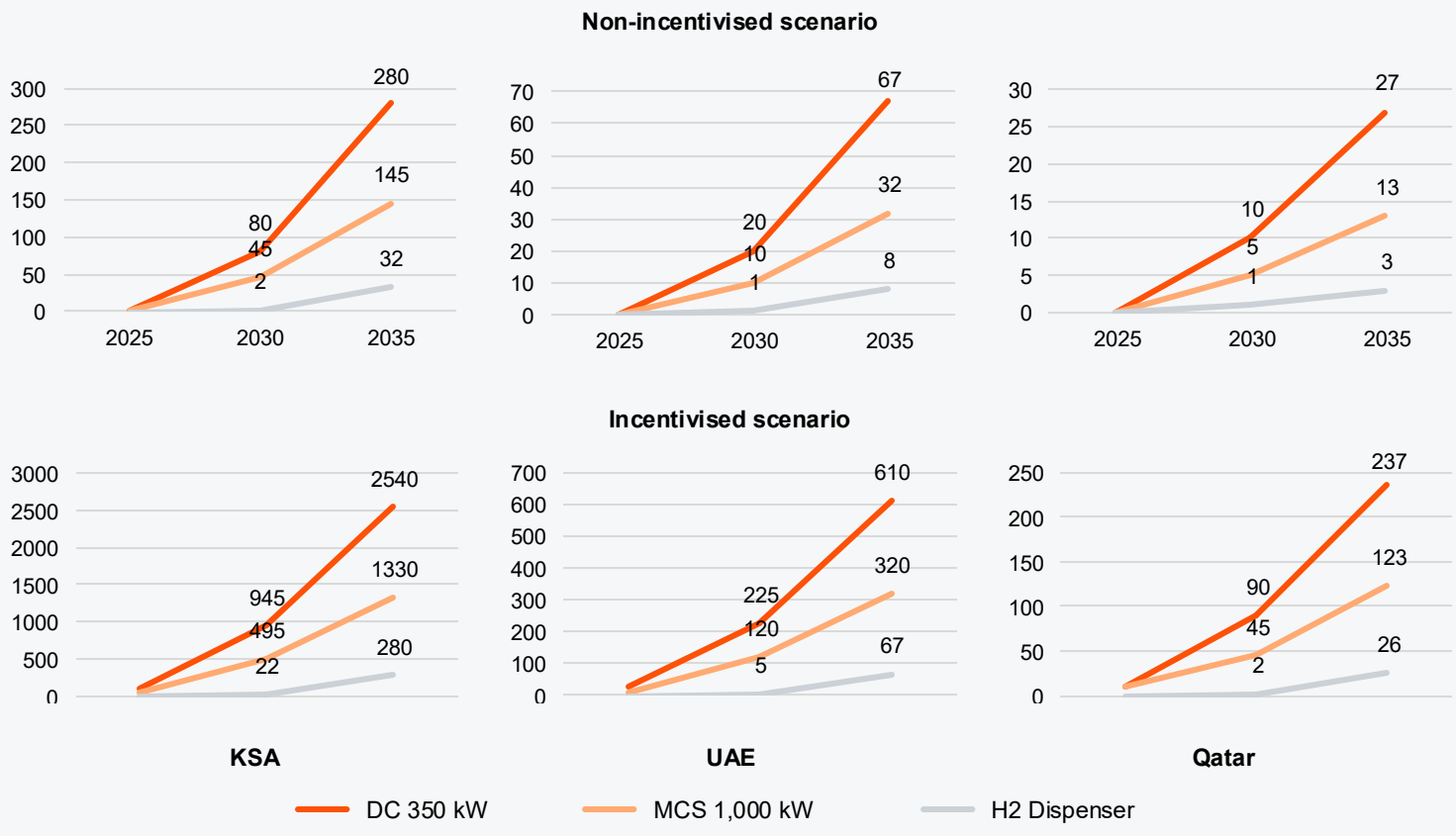
In reality, market dynamics complicate the equation. Most ICE trucks entering the GCC are 6-8-year-old second-hand imports from Europe, priced at 40-50% of new models. New electric trucks cost at least twice as much as diesel alternatives, with insurance premiums up to three times higher. With operators expecting a four-year payback, such economics make early EV adoption challenging without targeted incentives.

2. Charging and hydrogen Infrastructure

Depot charging, public fast chargers and megawatt charging systems (MCS) are all needed to support varied road freight operations. In the GCC, most public chargers are still limited to 180kW due to grid constraints – upgrades to 350kW and 1,000kW are essential.

Hydrogen refuelling is at an earlier stage, requiring complex and costly infrastructure beyond dispensers, including production and distribution systems. While BEVs are expected to lead adoption, hydrogen may still play a role in long-haul road freight where battery range and charging time remain limiting factors – if infrastructure and vehicle availability improve.

Figure 4: Public Charge point Demand & H2 Dispenser Demand in KSA, UAE and Qatar



Source: TruKKer and PwC Middle East analysis

06

Policy-driven vs market-driven adoption

A tale of two trajectories

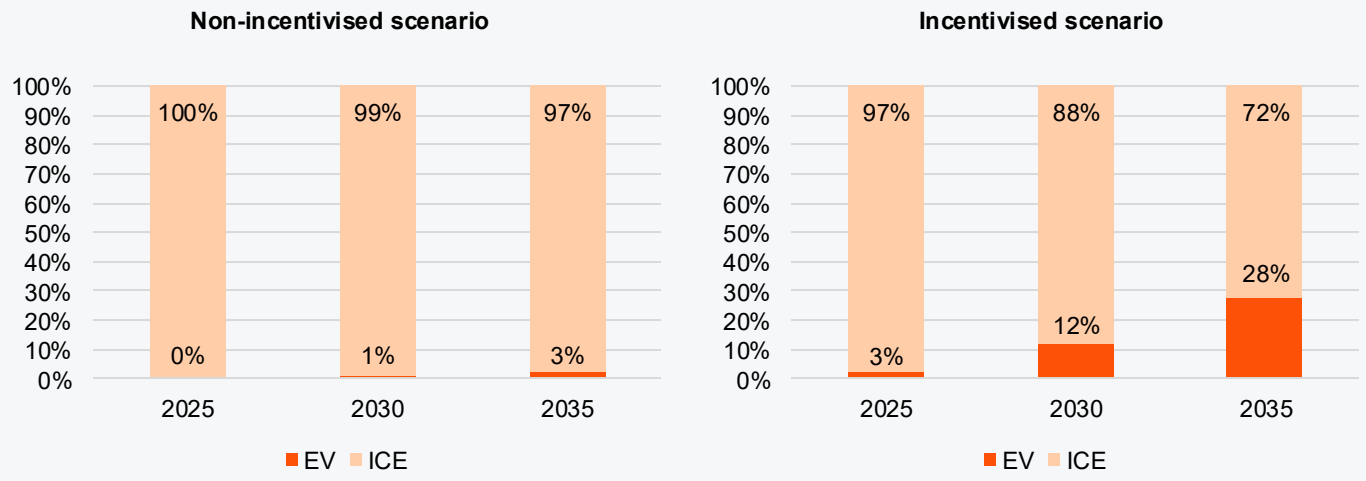
Electric truck adoption in the GCC follows two possible paths – with policy support emerging as the key differentiator. A market-only scenario sees limited progress, held back by cost, infrastructure gaps and regulatory inertia. In contrast, government intervention drives steep growth, making policy-led transformation not just desirable but essential.

Non-incentivised uptake – a sluggish start

Without regulatory or fiscal incentives, adoption remains marginal. By 2030, electric trucks are projected to reach just 1% of new heavy-duty sales, rising to only 3.4% by 2035. ICE vehicles would still dominate with a 97% market share.

This minimal uptake would have little impact on power systems. Additional electricity demand stays below 9TWh by 2035 – just 1.2% of projected renewable generation – offering little case for infrastructure investment or grid upgrades.

Figure 5: Expected share of electric trucks of total annual sales in GCC (until 2035)



Source: TruKKer and PwC Middle East analysis

Incentivised uptake – unlocking market acceleration

In contrast, a policy-led approach accelerates adoption significantly. Under a governmentally accelerated trajectory, PwC analysis indicates that electric trucks could reach 28.2% of new heavy-duty vehicle sales by 2035 – an eightfold increase compared to the market-only path. Additionally, annual EV truck sales are projected to rise from fewer than 1,000 units in 2025 to nearly 15,000 units in 2035.

Several reinforcing drivers enable this growth:

01

Ambitious national strategies Saudi Arabia aims for a 25% CO2 reduction in the transport sector by 2030 as part of its National Logistics Strategy,[8] while Dubai (UAE) targets a 30% reduction under its Commercial Transport Strategy.[9] As per PwC analysis, achieving these targets requires that over 40% of new trucks sold by 2035 be zero-emission

02

OEM commitment and localisation – manufacturers including Mercedes,[10] AB Volvo[11] and MAN[12] have already begun local assembly lines within Saudi Arabia, reinforcing supply chain readiness and reducing lead times

03

Incentives and regulation – a coordinated suite of policy levers, including tax breaks, sales mandates, green procurement targets and infrastructure subsidies, helps lower the TCO gap and derisk adoption for fleet operators

04

Infrastructure partnerships – public-private collaboration enables the rollout of high-speed charging and hydrogen refuelling corridors, particularly along regional logistics routes

Even under this ambitious scenario, the additional electricity demand from truck electrification remains modest relative to the region's energy capacity, suggesting that power systems will not be a limiting factor for adoption.

07

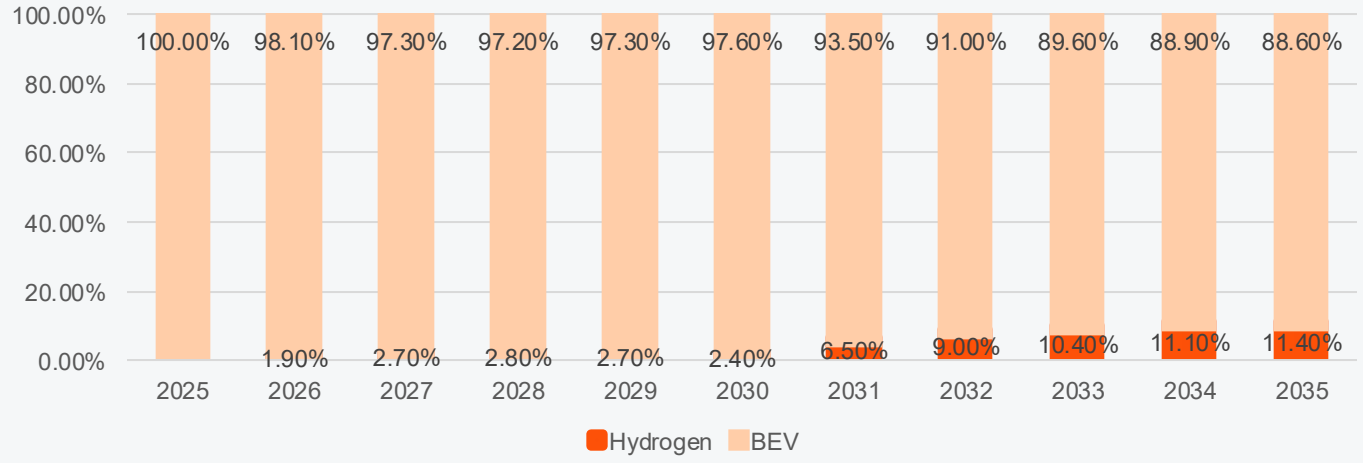
Scaling smart

Matching technology to regional needs

BEVs are currently the most viable option for decarbonising heavy-duty trucks in the GCC, particularly for short- and medium-haul operations. They align well with predictable routes and depot-based charging needs – typical of regional logistics and urban delivery. BEVs benefit from proven drivetrains, growing model availability and the ability to scale through known charging solutions. As shown in figures 5 and 6, under both the policy- and market-led scenarios, battery electric vehicles (BEVs) are projected to significantly outpace hydrogen fuel cell vehicles (FCEVs) through 2035 — reaching nearly 25% of new truck sales in the incentivised scenario, compared to less than 5% for hydrogen.

However, scaling challenges remain. While BEV infrastructure is deployable in phases via depot and fast-charging corridors, hydrogen requires more systemic investment across production, storage, distribution and dispensing. This complexity limits its short-term potential, despite its long-range benefits. The pragmatic path is phased: focus now on BEV deployment where it's ready to scale, while laying the regulatory and technical groundwork for hydrogen to follow. With hydrogen model availability still low and infrastructure immature, BEVs will lead the charge, but hydrogen holds long-term promise where range and payload demand it.

Figure 6: Percentage share of battery electric and hydrogen trucks of total annual sales in GCC



Source: TruKKer and PwC Middle East analysis

08

Powering the transition -

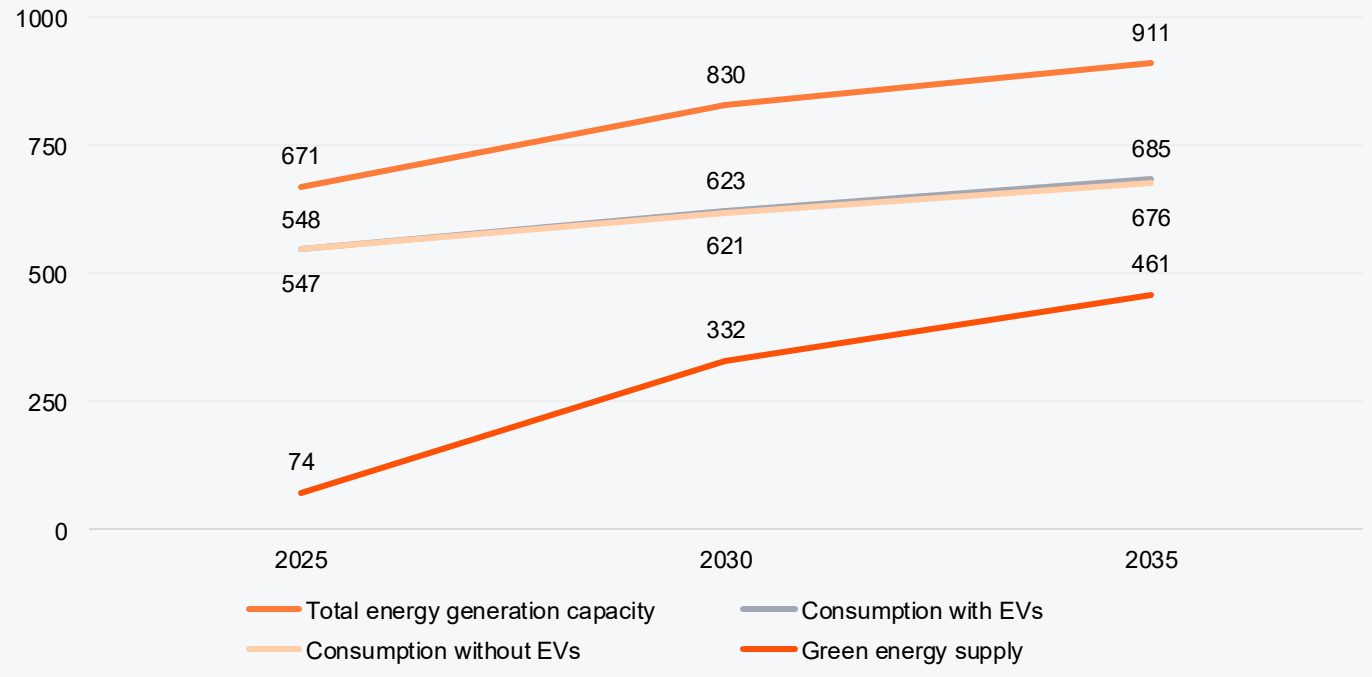
How the GCC can meet electricity needs with renewable expansion

Electrifying heavy-duty trucks will raise power demand across the GCC, but the increase will be modest and manageable. PwC analysis shows zero-emission vehicles will consume 9TWh by 2035 – just 1.2% of projected renewable generation – offering little case for infrastructure investment or grid upgrades.

This demand can be met by the region's expanding clean energy base, with solar, nuclear and green hydrogen investments already far outpacing expected load growth.

The real challenge is coordination – aligning grid upgrades with fleet deployment, enabling depot charging and anticipating demand along key road freight routes.

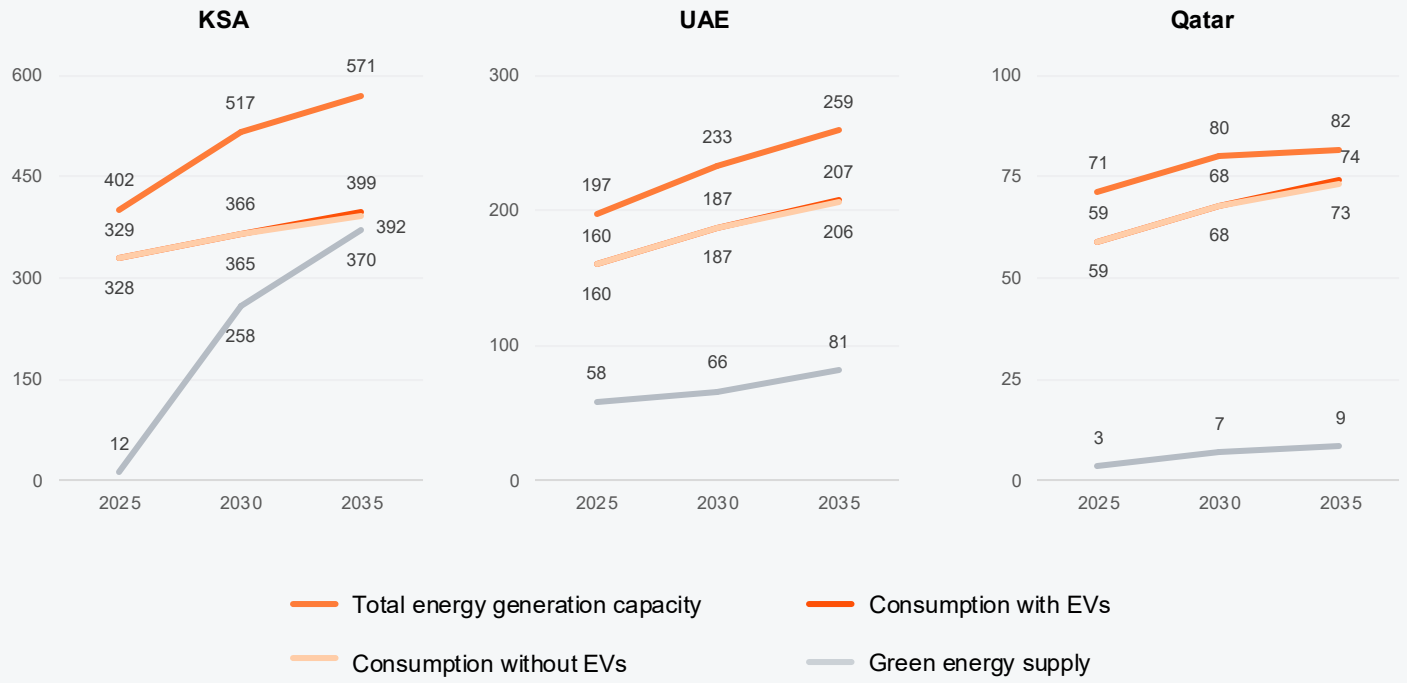
Figure 7: Cumulative energy generation vs. demand – with and without EVs in Saudi Arabia, UAE and Qatar until 2035 (in TWh)



Source: TruKKer and PwC Middle East analysis

The GCC's clean energy ambitions create a solid platform for zero-emission transport. Even in high-adoption scenarios, electric trucks will place minimal strain on national grids. The priority now is to sequence infrastructure rollouts with demand and ensure renewable energy is available where it's needed. With smart planning, the region can electrify heavy-duty trucks on a carbon-free power base.

Figure 8: By Country: Energy generation vs. demand – with and without EVs until 2035 (in TWh)



Source: TruKKer and PwC Middle East analysis

09

Lessons from TruKKer's electric truck adoption journey

ATOMIX, a subsidiary of the TruKKer Group, is driving the transformation of commercial transportation across the Middle East with the electric vehicle revolution.

The journey of ATOMIX started with assessing 90+ global suppliers and driving over 200k km in the region, highlighting a core insight: electrifying road freight is entirely feasible - but scaling it sustainably will require a blend of targeted investment, enabling policy and thoughtful, user-centric system design. It offers a useful microcosm of the broader challenges and solutions involved in decarbonising logistics across the Middle East. From initial pilots to successful intercity operations in the UAE, their journey reveals both structural barriers and practical enablers that other fleet operators can learn from.

The challenge of scaling

ATOMIX has piloted electric vans (e-Vans), light commercial vehicles (e-LCVs) and heavy commercial vehicles (e-HCVs) across various dynamic use cases. While these trials proved the technical viability of electric trucks, particularly in urban and intercity routes, the leap from pilot to scale presents a tougher test.

The key obstacles they encountered include:

Inadequate charging infrastructure: Key logistics hubs such as Dubai South, Al Quoz, Ras Al Khor and Dubai Industrial City lack sufficient grid capacity to support heavy-duty truck charging. Required power upgrades range from 160kW to 1MW per site

Uncompetitive total cost of ownership (TCO): Despite lower operating costs, electric commercial vehicles (e-CVs) still struggle to match the capital and insurance affordability of internal combustion engine (ICE) vehicles. Premiums for e-CVs are substantially higher and duty exemptions remain limited

Financing constraints: Government support in the form of affordable loans and insurance is absent or insufficient, weakening the case for fleet electrification

Driver and operational complexity: Route planning, shift scheduling and post-shift transportation for drivers all require redesign to maximise the range and uptime of e-CVs

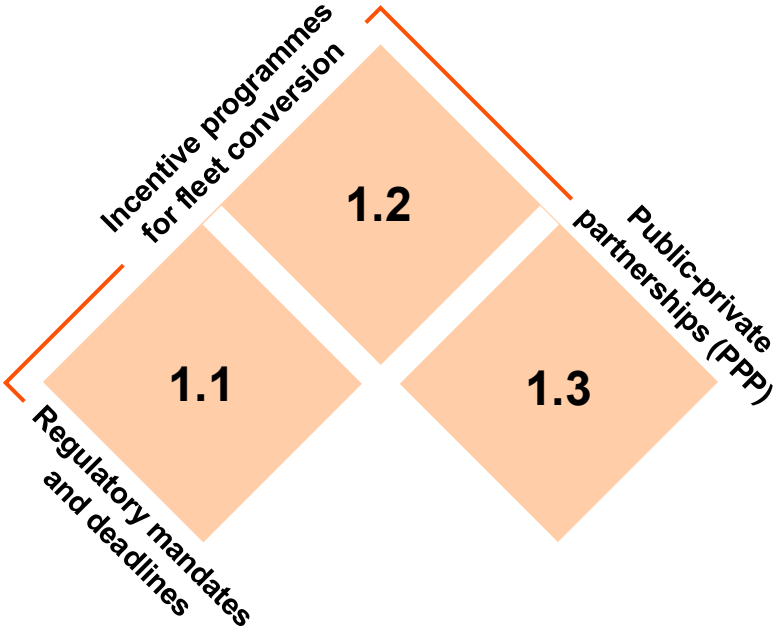
Key learnings from the pilot programmes show that electric trucks performed reliably even under extreme summer conditions, with no major disruptions. Driver behaviour significantly impacts energy efficiency and range, highlighting the importance of training and incentives. Features like adaptive cruise control and AI-assisted navigation enhanced both safety and energy performance. Additionally, design choices, such as distributed drive systems and liquid-cooled batteries, proved critical for maintaining thermal stability and operational efficiency.

10

Recommendations to enable EV and FCEV scale-up

1. Policy, regulation and market incentives

To catalyse the shift from ambition to action, the Middle East must embed sustainability into the regulatory and commercial DNA of road freight transport.



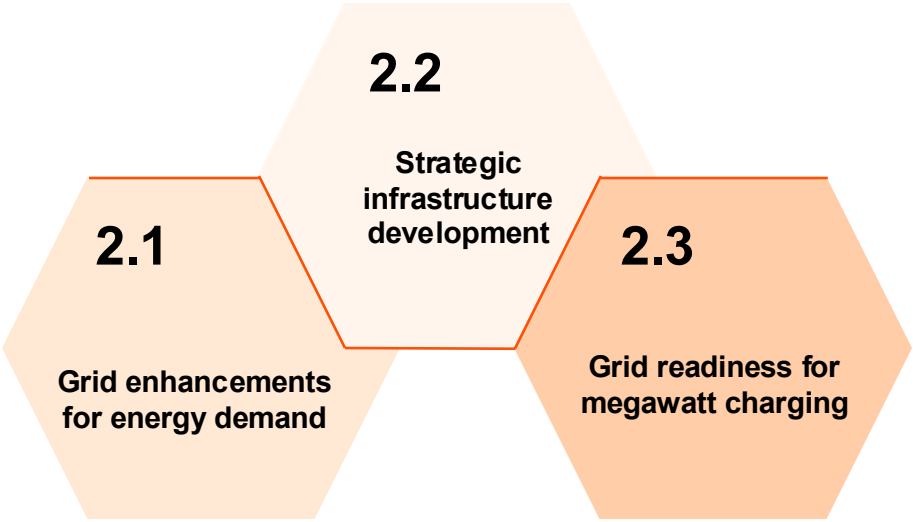
1.1 Policy and regulatory programmes for fleet conversion: Set clear emissions standards and phase-in targets for zero-emission truck sales. California's long-term mandate created early market certainty.[13] A similar approach could unlock investment and accelerate vehicle uptake across the region.

1.2 Incentive programmes for fleet conversion: Offer temporary purchase subsidies, custom duty and tax relief or reduced fees to lower the cost barrier for fleets. Germany's support scheme led to a 57.4% growth in electric truck registrations – showing how focused incentives can quickly shape demand.[14]

1.3 Public-private partnerships (PPP): The UK and Sweden[15] have made rapid progress through PPPs – a model Middle Eastern governments can adapt by partnering with OEMs, energy providers and retailers to scale heavy-duty truck charging networks.

2. Infrastructure and grid readiness

Strong, future-proof infrastructure is critical for making sustainable road freight operationally viable and commercially competitive.



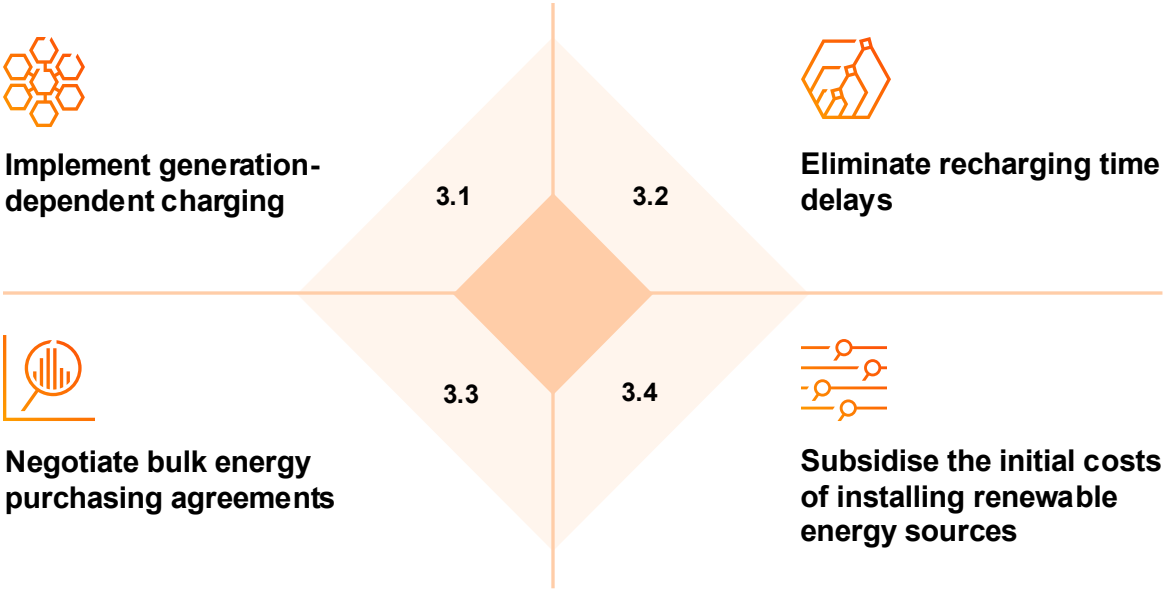
2.1 Grid enhancements for energy demand: Upgrade the national grid to absorb the increased load from EV charging, ensuring system reliability and long-term resilience

2.2 Strategic infrastructure development: Develop a regionwide network of high-speed charging and hydrogen refuelling stations along key road freight corridors, powered by renewables. Switzerland has already deployed megawatt charging for electric trucks[16] and a German study found that 1,000 MCS-equipped sites could serve nearly all truck traffic across Europe.[17]

2.3 Grid readiness for megawatt charging: Reinforce local grids to support the installation of high-capacity, multi-megawatt charging hubs required for heavy-duty logistics operations.

3. Energy innovation and cost optimisation

Sustainable heavy-duty trucks must be economically sustainable too. Energy strategy plays a central role in unlocking value for fleet operators.



3.1 Implement generation-dependent charging: Encourage charging during peak renewable generation and incentivise the use of self-owned solar PV systems. In Norway[18] and Australia[19] grants support EV charging powered by solar and battery storage, reducing energy costs and grid reliance.

3.2 Eliminate recharging time delays and access to public chargers: Enable public access to dedicated/slot-based MCS/super chargers for truck charging, wherever possible. Janus Electric's solar-powered battery swapping stations in Sydney match diesel refuelling times, removing a key barrier to EV adoption while using renewable energy.[20]

3.3 Negotiate bulk energy purchasing agreements: Help fleet operators secure discounted electricity through long-term PPAs. Zenobē Energy in the UK offers customised tariffs, price stability and integration with on-site renewables to reduce costs and improve planning.[21]

3.4 Subsidise the initial costs of installing renewable energy sources: Provide grants or low-interest loans to support solar and storage at depots. Australia's off-grid charging solutions offer a model for remote Middle Eastern logistics corridors with limited grid access.

4. Localised solutions for regional realities

The Middle East presents a unique mix of environmental, economic and operational conditions – solutions must be context-specific.

Customised solutions for local needs: Design vehicles and infrastructure tailored to high-heat environments, long-haul distances and the specific logistics demands of the GCC region. TruKKer and ATOMIX have successfully piloted electric trucks in the UAE, demonstrating their reliability and performance even in extreme heat conditions.

“With smarter policy, investment and the right incentives, zero-emission trucks can soon outpace their combustion-engine counterparts not just environmentally, but commercially. The GCC has everything it needs to lead this transition: a fast-growing clean energy base, a strong logistics backbone and the ambition to drive change. What’s needed now is confident and future-focused coordinated action. This isn’t just about cutting emissions. It’s about building a road freight system that’s more efficient, more resilient and ready for the next generation of growth.”

- Heiko Seitz

PwC | Global & Middle East eMobility Leader | Partner

The GCC is one of the fastest-growing, rapidly digitising markets with unprecedented investment in infrastructure and clean energy. In land freight, the energy transition is a cost-curve story: as infrastructure scales and technology advances, the gap to TCO parity closes. It's more complex here due to structurally lower fuel prices, but as economics converge, the transition becomes inevitable.

- Gaurav Biswas

Founder & CEO, TruKKer

Acknowledgements

This report was developed in collaboration with TruKKer, the digital freight platform, whose operational insights and data from across the Middle East were instrumental in grounding the analysis in real-world conditions. Drawing on the experience of TruKKer's electric vehicle subsidiary, ATOMIX, the report integrates first-hand learnings from EV pilot deployments across a variety of commercial use cases. Their contribution helped ensure that the findings reflect not only international best practice, but also the lived realities of fleet operators navigating the transition to zero-emission road freight in the GCC.

Research methodology

This study employs a mixed-methods approach combining both qualitative insights and quantitative analysis to examine the potential transition to sustainable trucking in the Middle East. The scope of the analysis is clearly defined to ensure relevance and depth. Specifically, the study focuses on trucks with a Gross Vehicle Weight (GVW) of 7.5 metric tonnes or more, targeting the medium and heavy-duty segments that contribute significantly to regional freight movement and emissions. Geographically, the research centres on the Middle East, with detailed assessments conducted across the United Arab Emirates (UAE), the Kingdom of Saudi Arabia and the State of Qatar.

These countries have been selected due to their strategic economic roles and growing interest in sustainable transport initiatives. In terms of technological focus, the study analyses the effects of electrification through the adoption of Battery Electric Trucks (BETs) and hydrogen-powered Fuel-Cell Electric Vehicles (FCEVs). By exploring these two emerging technologies, the research aims to provide insights into infrastructure readiness, market dynamics, policy implications, and overall feasibility of decarbonising the regional trucking sector.

List of resources

[1] https://www.wri.org/insights/climate-finance-sustainable-transport-low-middle-income-countries

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