



World Energy Outlook 2025

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Each WEO scenario maps out a distinct energy future

Exploratory Scenarios

The **Current Policies Scenario**

Anchored in enacted laws and measures

The **Stated Policies Scenario**

A dynamic reading of today's policy settings

Normative Scenarios

The **ACCESS Scenario**

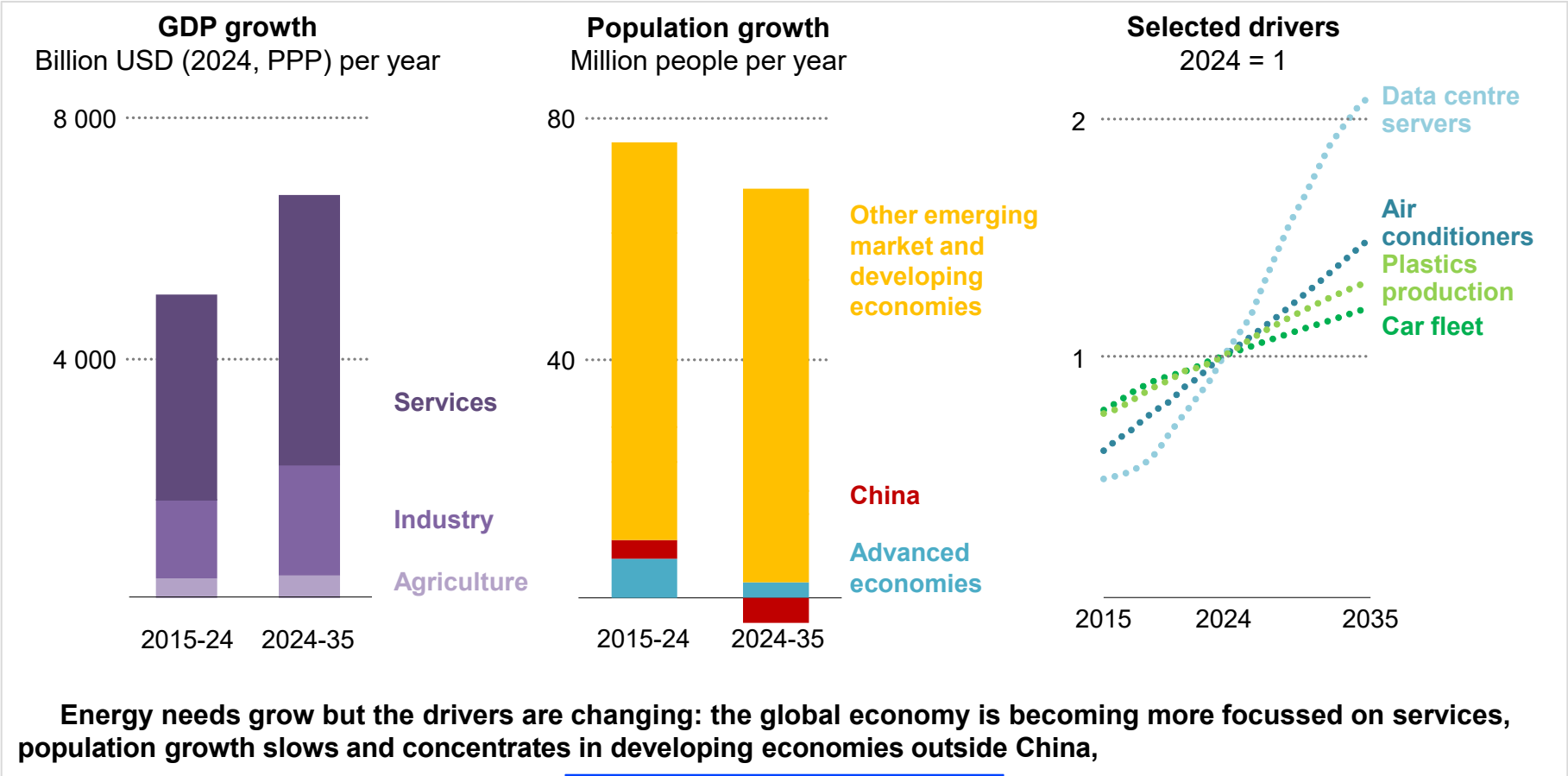
A roadmap for universal energy access to electricity and clean cooking

The **Net Zero Emissions by 2050 Scenario**

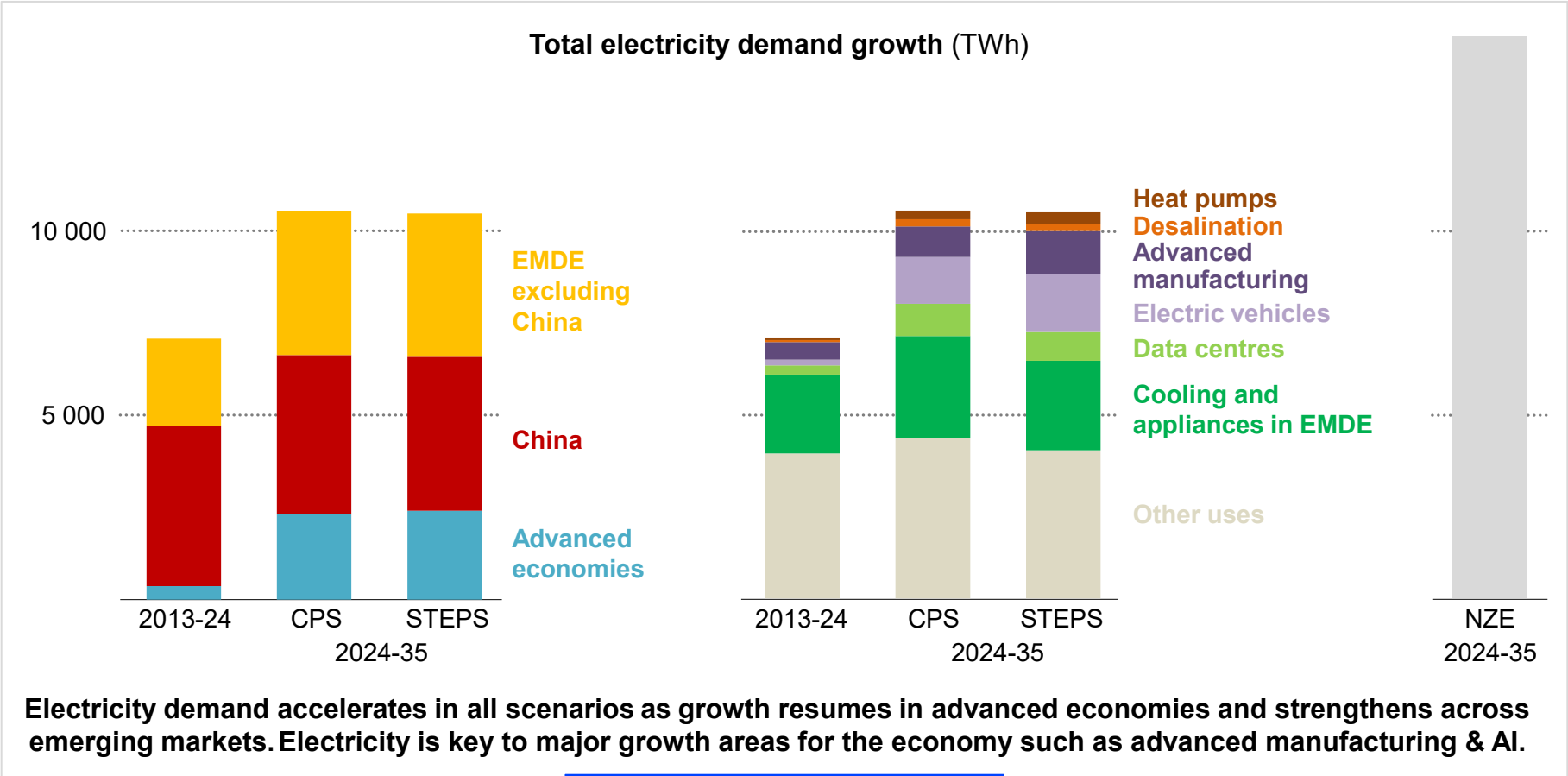
A global pathway to limit warming to 1.5°C

All scenarios use the latest data on energy supply and demand, markets, projects and technology costs. Exploratory scenarios set starting conditions and see where they lead; normative scenarios work towards specific outcomes.

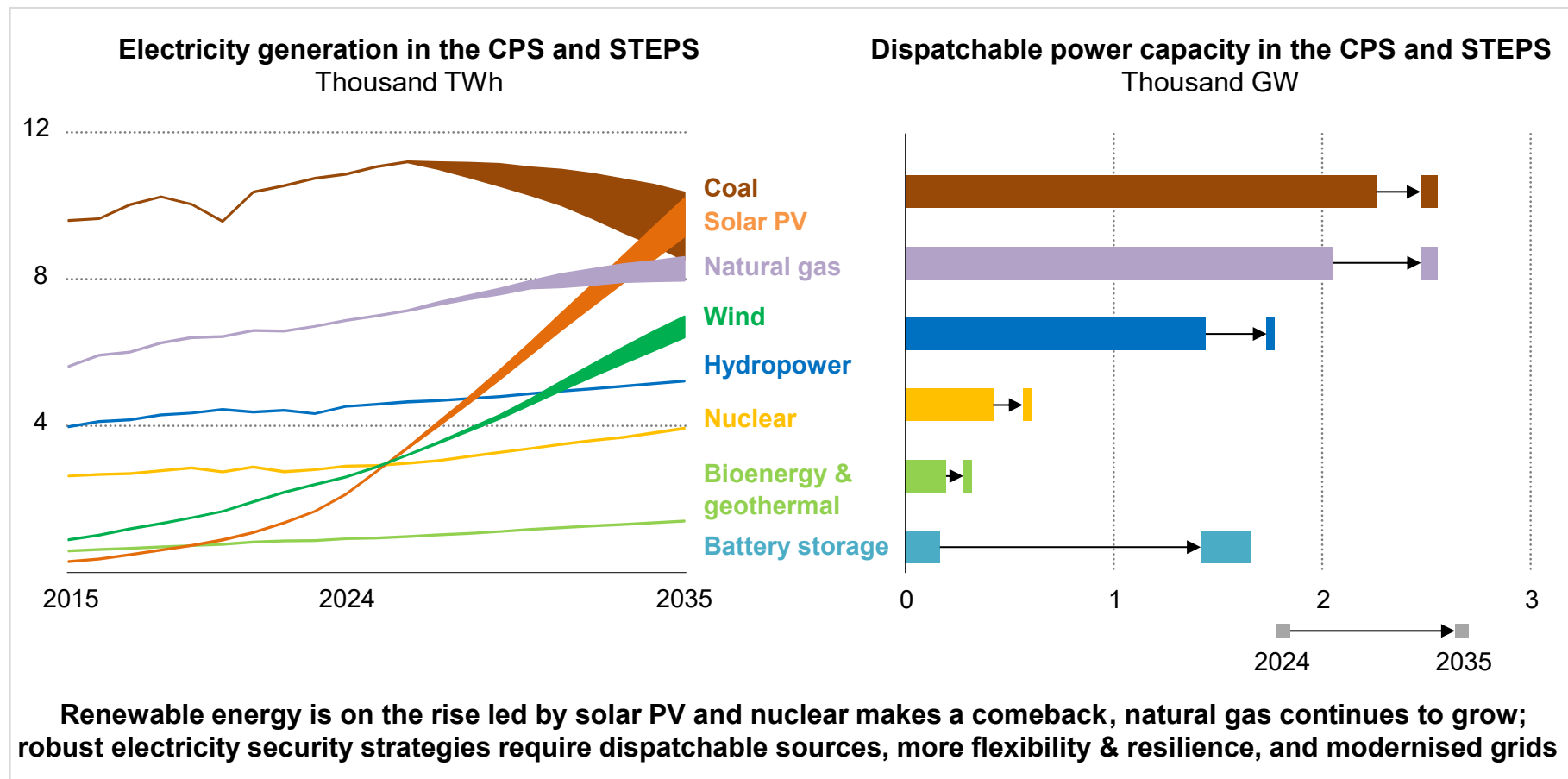
New players set the trends as energy needs rise



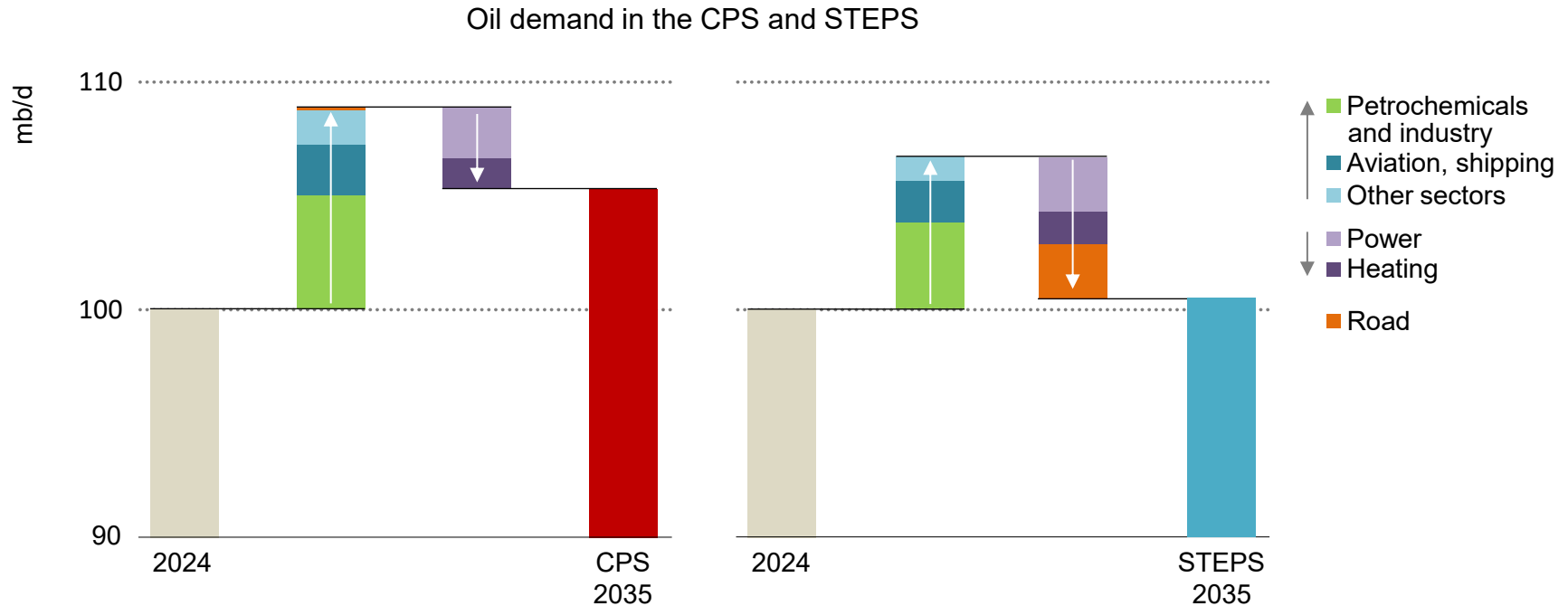
The Age of Electricity is here



Changing power systems are reshaping electricity security

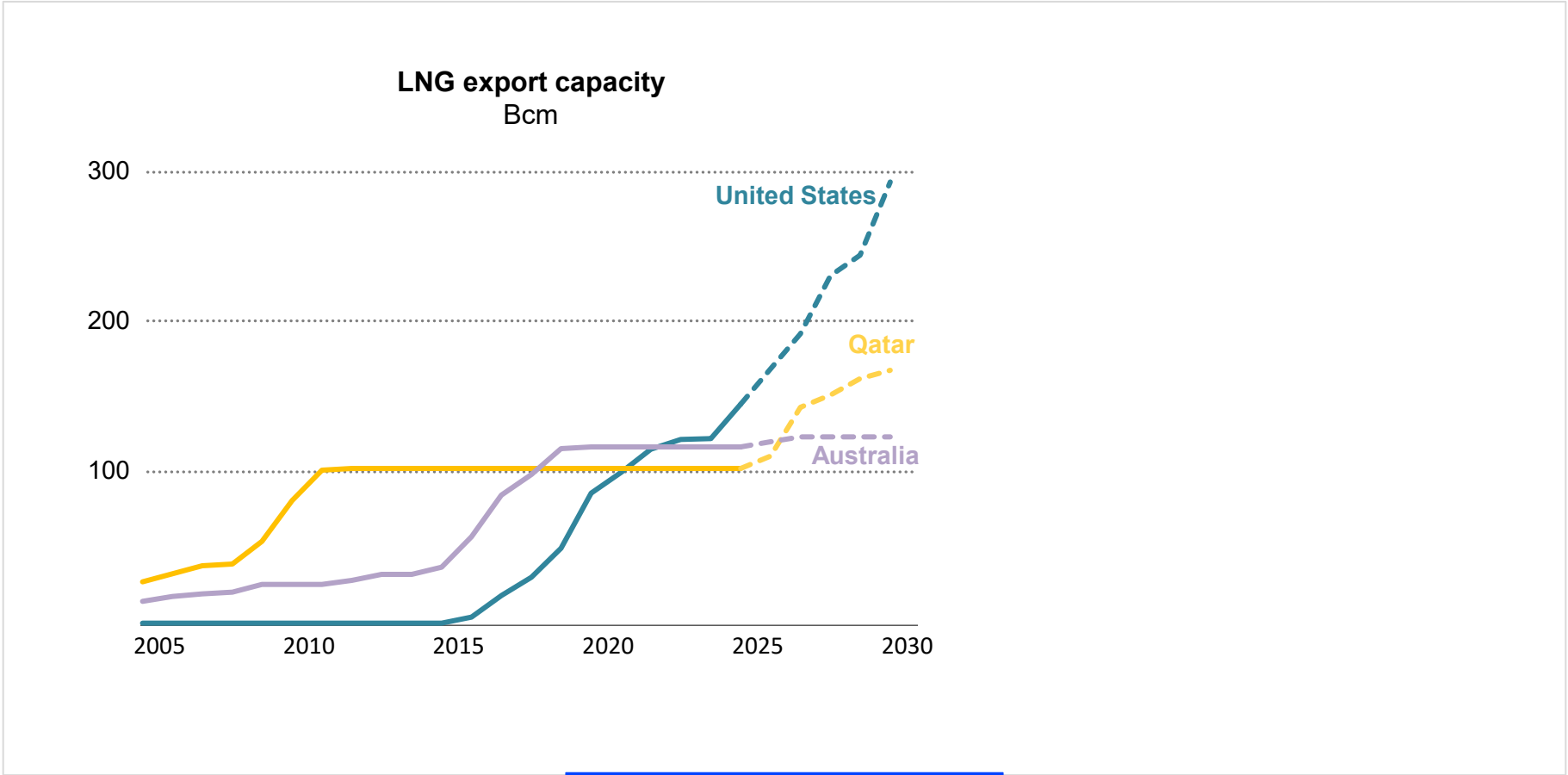


Turning points for oil markets and EVs

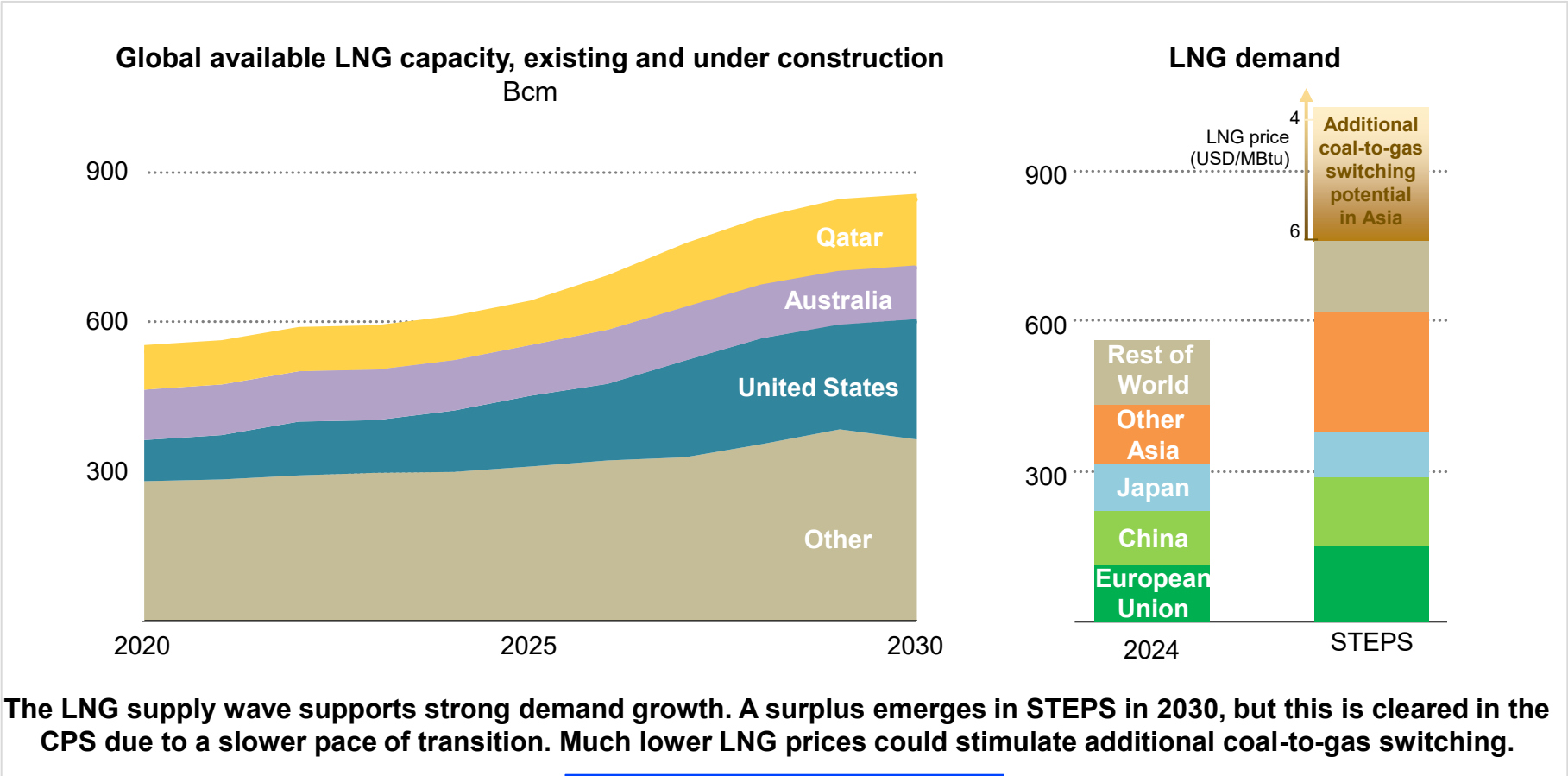


Road transport is the sector that explains continued oil growth in CPS versus a flattening around 2030 in STEPS; China and Europe deepen electrification in all scenarios, but open questions remain about EV uptake rates elsewhere

New US project approvals add to the wave of LNG



Where will all the LNG go?



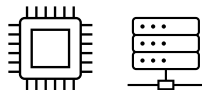
Critical minerals: high concentration raises supply risks

Share of top refining country for energy-related strategic minerals, 2024

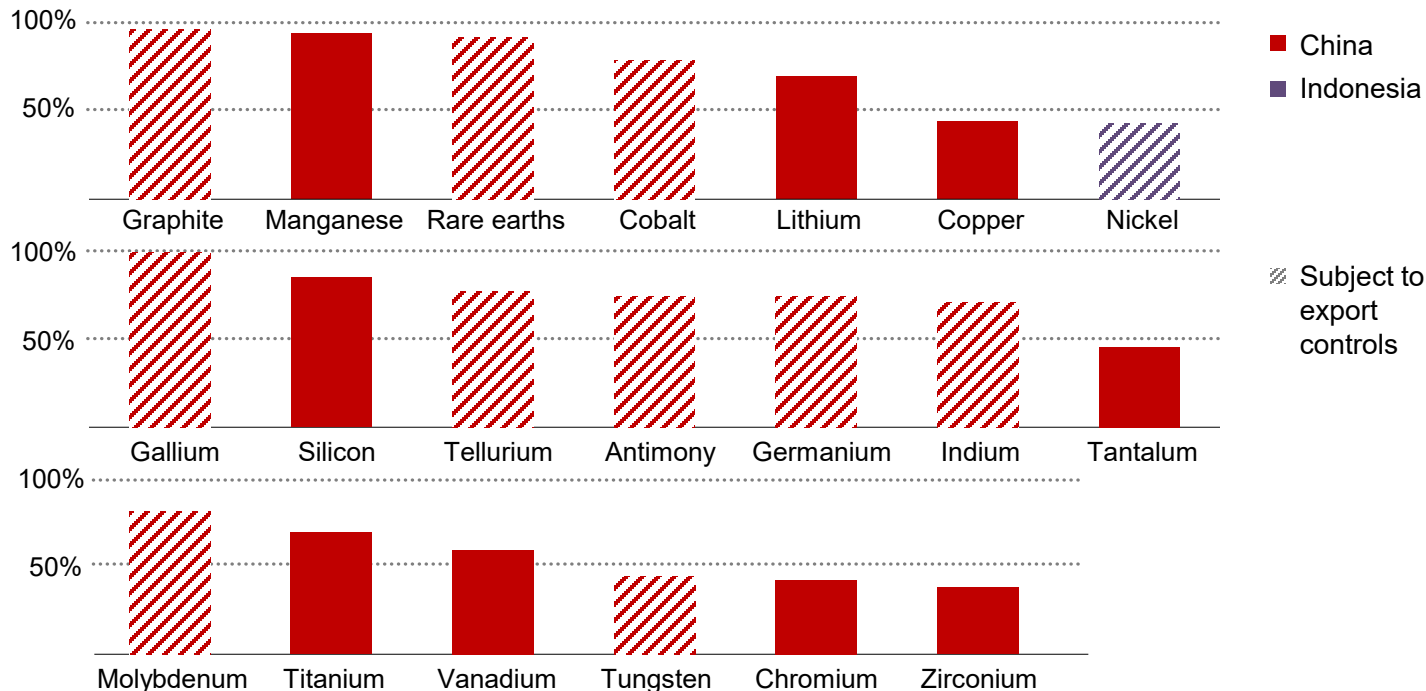
**Batteries, grids,
renewables**



**AI, data centres,
high-techs**



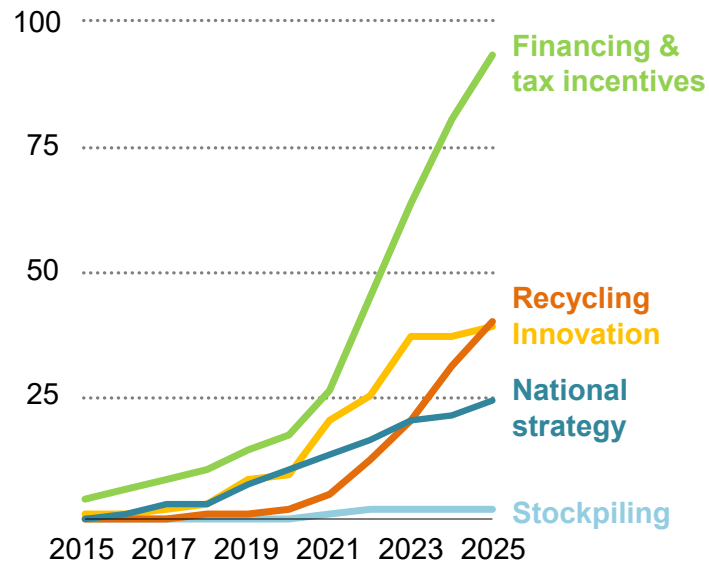
**Aerospace,
industry, defence**



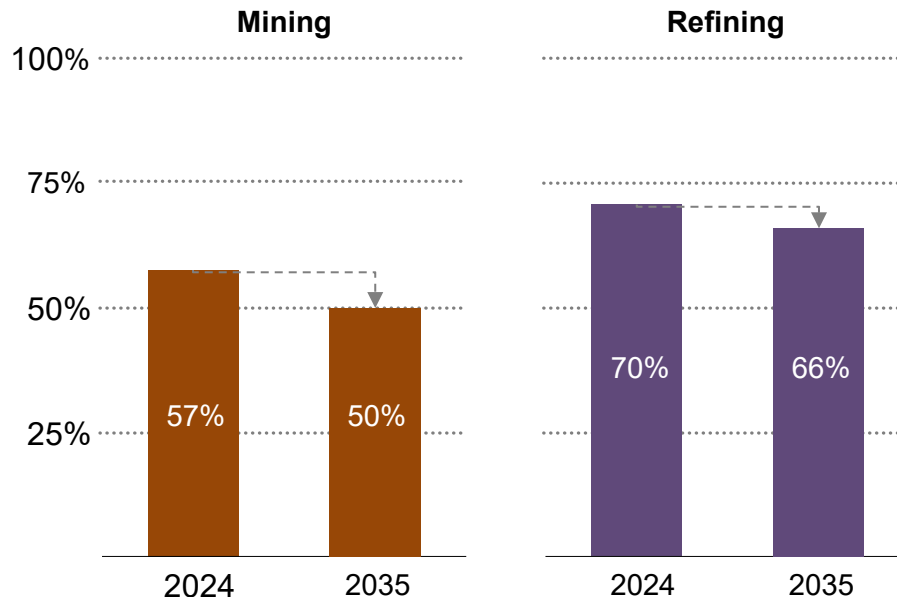
Critical minerals are vital not only for energy security but also for broader economic resilience, but the remarkably high level of market concentration leaves global supply chains vulnerable to disruptions

Diversification efforts need to look beyond mining

Number of announced critical mineral policies
(since 2015)

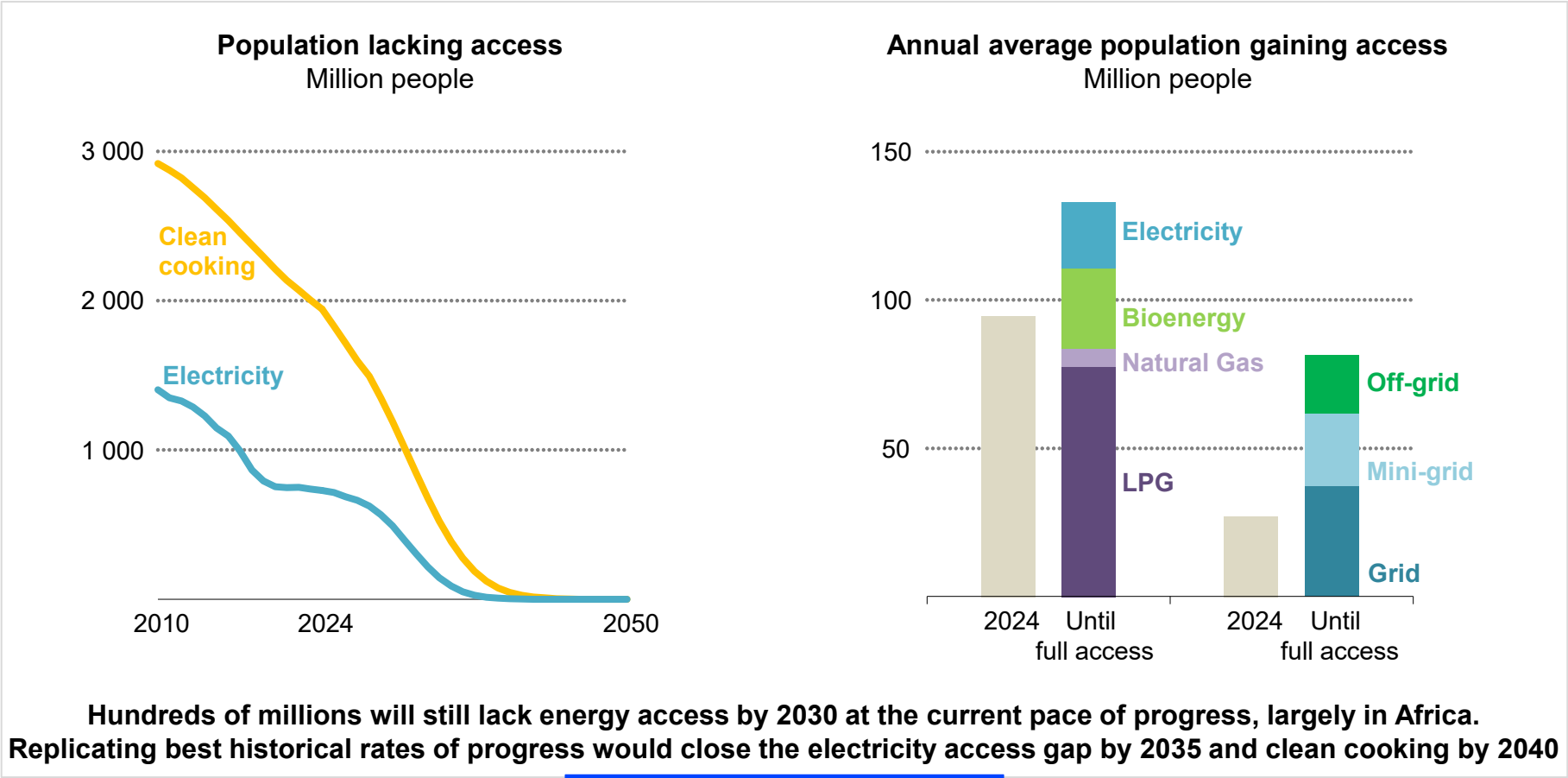


Average share of top producing country
for key energy minerals

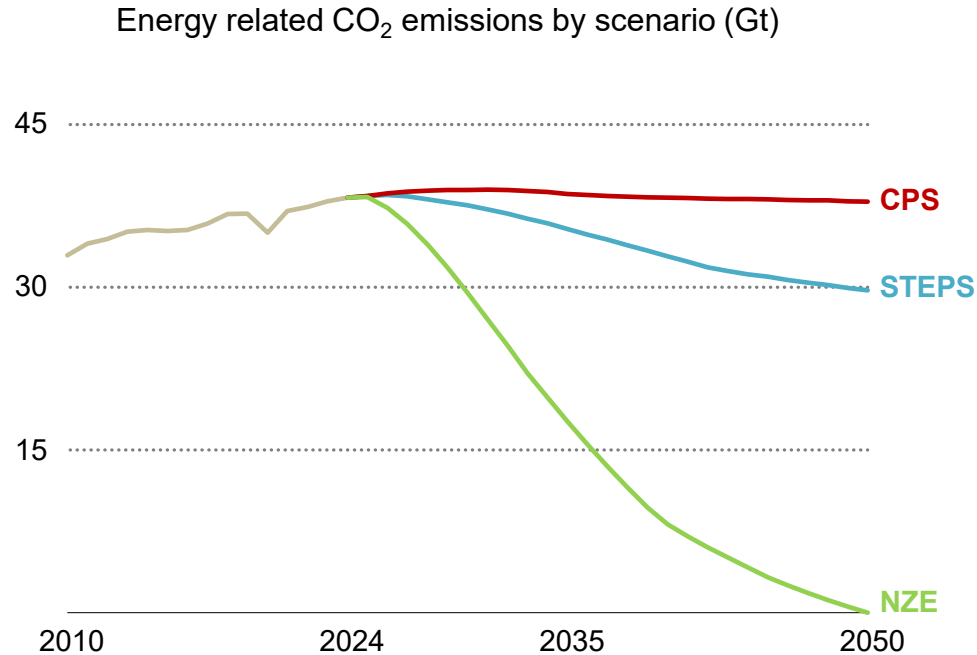


Governments have woken up to the risks of high concentration, but accelerated efforts are needed to underpin more resilient and diversified supply chains, especially in processing and refining

Shifting gears to achieve access for all



Diverging futures for global emissions and climate change



All scenarios exceed 1.5 °C of warming on a regular basis by 2030; tried and tested technologies & policies are available to accelerate transitions, but returning below 1.5 °C will now also require large-scale carbon removal

