



NIDL

EXPANDING HORIZONS

ANNUAL REPORT 2023

التجارة

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“ We live in an era that poses many challenges. This calls for objective and comprehensive consideration to develop economic mechanisms to address these rising challenges. Such development should be based on proper scientific study and principles. ”

Custodian of the Two Holy Mosques

King Salman bin Abdulaziz Al Saud

May Allah protect him

“ The Kingdom’s future is promising, and it deserves more than what has been achieved so far. We will double our capabilities to pave the way towards a greater future. ”

His Royal Highness

Prince Mohammed bin Salman bin Abdulaziz Al Saud

Crown Prince, Prime Minister, and Chairman of
the Council of Economic and Development Affairs
May Allah protect him.



NIDL Chairman's Message



H.E. Bandar bin Ibrahim Alkhorayef
 Minister of Industry and Mineral Resources
 & NIDL Chairman

Saudi Vision 2030 continues its relentless pursuit of a radical transformation in the Kingdom's lifestyle patterns. These patterns include economic and social contexts stemming from an ambitious strategic vision aiming to achieve sustainable development and diversify the Kingdom's economy and income sources. This is achieved by maximizing the value derived from sectors such as energy, mining, industry, and logistics, and by optimally utilizing its resources and capabilities. This grand vision aspires to transform the Kingdom into a global economic power, enhance the lives of its citizens, and build a modern and prosperous society through integrating its executive programs.

Since its launch in 2019, the National Industrial Development and Logistics Program (NIDL) has worked to transform Saudi Arabia into a leading industrial power and a global logistics hub, achieving economic diversification by developing non-oil sectors and promising future growth sectors. It also aims to enhance the participation of these sectors in attracting investments and supporting the GDP, especially with the unlimited support the program receives from the Custodian of the Two Holy Mosques, King Salman bin Abdulaziz, and His Royal Highness Prince Mohammed bin Salman bin Abdulaziz, Crown Prince, and Prime Minister.

As of the end of 2023, the program has successfully completed 102 initiatives out of a total of 283. This represents 36% of the initiatives, with 144 additional initiatives currently on the right track. The program has had a clear and active role in assisting sectors to implement their programs and initiatives and contribute to their achievements. This report aims to highlight various accomplishments at the macroeconomic level, including the program sectors' contribution of over 345 billion riyals to the GDP, the increase of non-oil merchandise exports exceeding 206 billion riyals, and the number of workers in the program sectors exceeding 204,000, with Saudi workers exceeding 82,000.

Finally, I extend my deepest gratitude and appreciation to the Custodian of the Two Holy Mosques, King Salman bin Abdulaziz, and His Royal Highness Crown Prince Mohammed bin Salman bin Abdulaziz—may God protect them—for their continuous support of the program. I also thank the program committee's esteemed members, executive bodies' leaders, and the program team for their efforts to achieve the program's aspirations and national goals. We look forward to achieving more contributions, achievements, and successes in the coming years.

NIDL CEO Message



Eng. Suliman bin Khaled Al-Mazroua

Program's CEO

The year 2023 witnessed numerous national achievements across various levels, especially in the sectors of the National Industrial Development and Logistics Program. Without exaggeration, I can say that 2023 is the year of accomplishments, with many achievements expected to be realized in 2025 being reached earlier—thanks to God.

Looking at the program's performance, its execution rate raised to 87%, with a spending rate of 91% of the year's allocation budget. The program contributed to the macro economy and the non-oil GDP by more than 35%, with non-oil exports growing by 74%. The total jobs created by the program sectors for Saudis in the economy reached 60%.

Reviewing the achievements and focus areas of the program sectors in 2023, the energy sector stands out with the initiation of gas injection in the Hawiyah Unayzah Gas Reservoir Storage project, with a storage capacity of 2 billion standard cubic feet of natural gas per day to be injected into the main gas network. Additionally, a power purchase agreement was signed for six new solar energy projects with a capacity of 6.2 gigawatts, aiming to increase the proportion of renewable energy to reach the optimal mix, enhance the efficiency of the electricity sector, and reduce carbon emissions. The final operation of the Jeddah, Rabigh, and Sudair solar power plants, each with a capacity of 2.1 gigawatts, was completed.

In the mining sector, the total completed area of the Arabian Shield by the end of 2023 represented more than 30% of the general geological survey program's work. In the industrial sector, His Royal Highness the Crown Prince, Prime Minister, and Chairman of the Economic and Development Affairs Council launched four new special economic zones, bringing the

total to five. These zones aimed at developing and diversifying the Saudi economy and improving the investment environment. The announcement of the launch of "Ceer" for car manufacturing and an agreement to establish the first integrated factory for electric vehicle production in the Kingdom with Lucid Motors was made. Additionally, the Public Investment Fund signed an agreement with Hyundai, highlighting the Kingdom's new industrial direction as outlined by Vision 2030.

In the logistics sector, His Royal Highness the Crown Prince launched the master plan for logistics centers, aiming to make the Kingdom a global logistics hub.

In the Fourth Industrial Revolution axis, the Centre for the Fourth Industrial Revolution (C4IR) was launched in the Second Industrial City in Riyadh, under the supervision of King Abdulaziz City for Science and Technology. In the local content axis, the Saudi Authority for Industrial Cities and Technology Zones (MODON) made notable progress in the initiatives related to the food industries cluster in Jeddah.

Finally, I extend my deep gratitude and appreciation to the esteemed members of the program committee and the leaders of the executive bodies for their great national achievements. I also thank the program team for their significant efforts in 2023, contributing to these accomplishments. We look forward to more dedication in serving this nation and achieving its goals in the coming years, which will significantly reinforce the impact of this program and Vision 2030 on the people, society, and life, with God's help first, and the wise leadership's support second.

Program Overview

NIDLDP aims to transform the Kingdom into a leading industrial powerhouse and a global logistics hub by maximizing the value achieved from the mining and energy sectors, as well as integrating the two focus areas of local content and the fourth industrial revolution.



Energy Sector



Mining Sector



Industry Sector



Logistics Sector



Fourth Industrial Revolution



Local Content

The program will significantly contribute to maximizing and diversifying the economic impact of the targeted sectors, sustaining their growth, achieving their leadership, and creating an attractive investment environment in each of them. NIDLDP was launched early 2019, based on the leadership's confidence in the importance of the four program sectors (Energy, Mining, Industry, and Logistics). Their integration is key to achieving added value, maximizing, and diversifying the economic impact, and creating an attractive investment environment.

The program significantly prioritises the two focus areas of local content and the fourth industrial revolution, considering them among the most important enablers of the included sectors, as well as key factors that support each sector in reaching their objectives and the desired impact.

The program is currently working on developing the infrastructure of its four sectors, making them major elements in raising the competitiveness of the Kingdom and its attractiveness as an ideal destination for investment. It is also working towards the optimal utilization of resources, improving policies and legislation related to the sectors, and receiving investments of the local and foreign private sector. The program further focuses on improving the trade balance, creating a competitive local industry in global markets, and securing sustainable competitive advantages. Such advantages aim to drive innovation, support a diversified and growing economy, create job opportunities, achieve the optimal energy mix, and boost the Kingdom's logistical connectivity locally and globally.

Board Members



His Excellency Mr.

Bandar Ibrahim Alkhorayef

Minister of Industry and Mineral Resources
NIDLP Chairman



His Excellency Eng.

Saleh bin Nasser Al-Jasser

Minister of Transport and Logistic Services
Vice Chairman NIDLP



His Excellency Eng.

Abdullah bin Amer Al-Swaha

Minister of Communications and Information
Technology
NIDLP Committee Member



His Excellency Mr.

Faisal bin Fadhel Alibrahim

Minister of Economy and Planning
NIDLP Committee Member



His Excellency Eng.

Khalil Bin Ibrahim Ibnsalamah

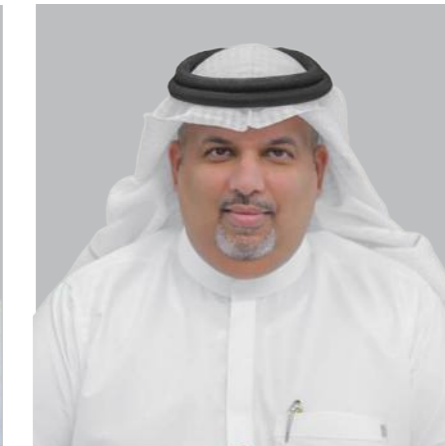
Deputy Minister of Industry and Mineral Resources
for Industrial Affairs
NIDLP Committee Member



Eng.

Ahmed bin Musa AlZahrani

Representative of the Ministry of Energy
NIDLP Committee Member



Eng.

Saleh bin Ali Khabti

Representative of the Ministry of Investment
NIDLP Committee Member

NIDLP Sectors and Focus Areas

Industry
Sector

Energy
Sector
















































Logistics
Sector

Mining
Sector

Fourth Industrial
Revolution

Local
Content

Executing Entities and Success Partners

 وزارة الصناعة والثروة المعدنية Ministry of Industry and Mineral Resources	 وزارة النقل والخدمات اللوجستية Ministry of Transport and Logistic Services	 وزارة الطاقة MINISTRY OF ENERGY	 وزارة الاستثمار Ministry of Investment	 وزارة الاتصالات وتقنية المعلومات MINISTRY OF COMMUNICATIONS AND INFORMATION TECHNOLOGY	 وزارة التجارة Ministry of Commerce	 وزارة الاقتصاد والتخطيط MINISTRY OF ECONOMY & PLANNING
 وزارة البيئة والمياه والزراعة Ministry of Environment Water & Agriculture	 الموارد البشرية والنتمية الاجتماعية Human Resources and Social Development	 وزارة التعليم Ministry of Education	 وزارة الصحة Ministry of Health	 وزارة الشؤون البلدية والقروية Ministry of Municipal & Rural Affairs	 وزارة الحرس الوطني Ministry of National Guard	 وزارة الداخلية المملكة العربية السعودية
 موانئ MAWANI الهيئة العامة للموانئ SAUDI PORTS AUTHORITY	 الهيئة الملكية للجبل وينبع Royal Commission for Jubail & Yanbu	 هيئة المساحة الجيولوجية السعودية SAUDI GEOLOGICAL SURVEY	 GACA الهيئة العامة للطيران المدني General Authority of Civil Aviation	 منشآت monsha'at الهيئة العامة لشركات الصغيرة والمتوسطة Small & Medium Enterprises General Authority	 الصادرات السعودية هيئة تنمية الصادرات السعودية	 TGA الهيئة العامة للنقل Transport General Authority
 مدن MODON	 الهيئة العامة للصناعات العسكرية General Authority for Military Industries	 هيئة المحتوى المحلي والمشتريات الحكومية Local Content & Government Procurement Authority	 هيئة المدن والمناطق الاقتصادية الخاصة Economic Cities and Special Zones Authority	 SDAIA الهيئة السعودية للبيانات والذكاء الاصطناعي Saudi Data & AI Authority	 هيئة الزكاة والضريبة والجمارك Zakat, Tax and Customs Authority	 هيئة تنظيم المياه والكهرباء WATER & ELECTRICITY REGULATORY AUTHORITY
 50 YEARS SIDF صندوق التنمية الصناعية السعودي	 KACST مدينة الملك عبدالعزيز للعلوم والتقنية	 مدينة الملك عبد الله للطاقة الذرية والمتجددة K-A-CARE	 المركز الصناعي Industrial Center	 الهيئة العامة للغذاء والدواء Saudi Food & Drug Authority	 المؤسسة العامة للتدريب التقني والمهني Technical and Vocational Training Corporation	 المركز السعودي لشركات الاستراتيجية الدولية Saudi Center For International Strategic Partnerships
 صندوق تنمية الموارد البشرية HUMAN RESOURCES DEVELOPMENT FUND	 البرنامج الوطني لتطوير قطاع الثروة الحيوانية والسمكية National Livestock and Fisheries Development Program	 SAR الخطوط الحديدية السعودية SAUDI ARABIA RAILWAYS	 المجلس الصحي السعودي Saudi Health Council	 مجلس الغرف السعودية Council of Saudi Chambers	 معادن MA'ADEN	
 هيئة تنظيم المياه والكهرباء WATER & ELECTRICITY REGULATORY AUTHORITY	 وحدة التحول الرقمي National Digital Transformation Unit	 كفاءة المركز السعودي لكفاءة الطاقة Saudi Energy Efficiency Center	 الهيئة السعودية للمواصفات والمقاييس والجودة Saudi Standards, Metrology and Quality Organization	 KAEC مدينة الملك عبدالله الاقتصادية	 Integrating Towards a Prosperous Future	

Program Objectives



3
Vision Pillars



A Vibrant Society



A Thriving Economy



An Ambitious Nation

1 of 6
of Level 1 Strategic Objectives

Strengthen Islamic Values and National Identity

Offer Fulfilling and Healthy Life

Increase Employment

Grow and Diversify the Economy

Enhance Government Effectiveness

Enable Social Responsibility

Direct contribution
 Indirect contribution

4 of 27
of Level 2 Strategic Sub-objectives

Grow contribution of the Private Sector to the economy

Maximize value captured from the energy sector

Unlock potential of non-oil sectors

Position Saudi Arabia as a global logistic hub

12 of 96
Level 3 detailed objectives



National Industrial Development and Logistics Program

- Create special zones & rehabilitate economic cities.

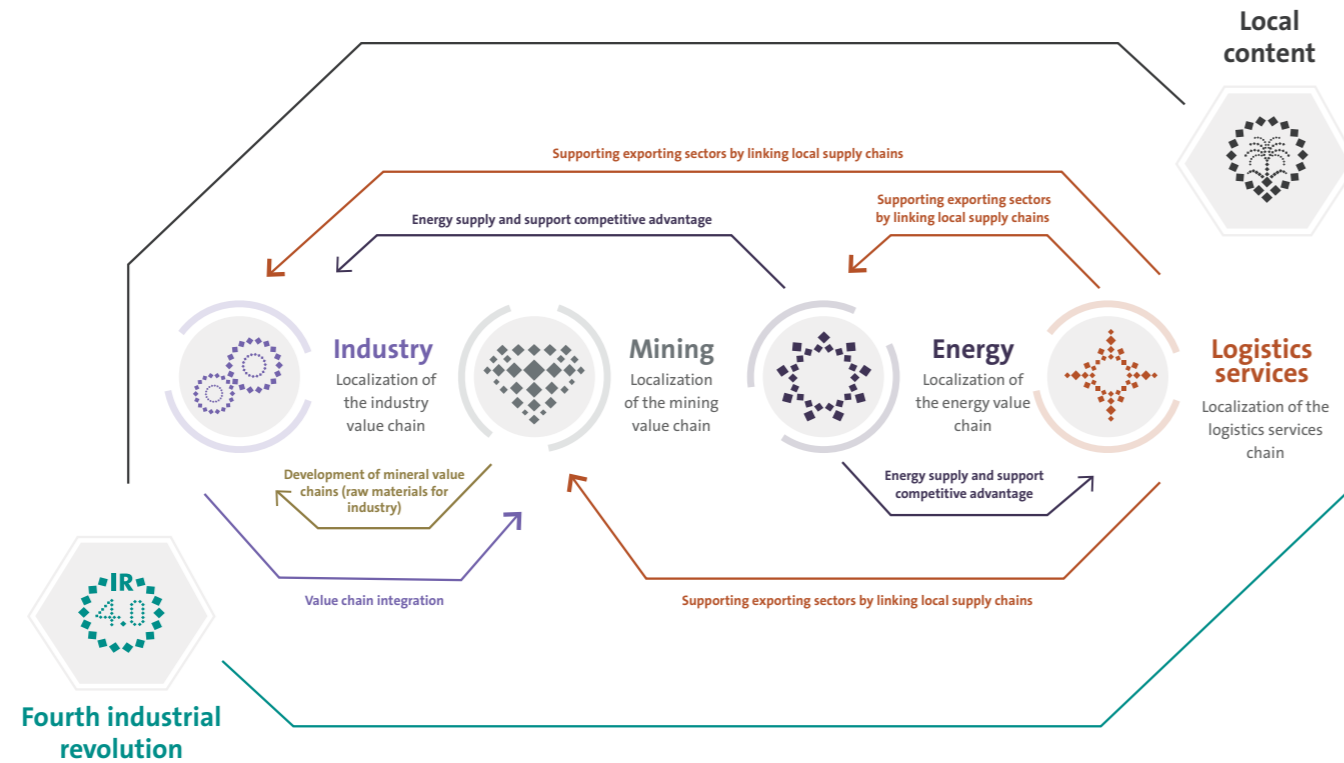
- Increase Local Content of Oil & Gas sector.
- Raise gas production and distribution capacity.
- Develop oil and gas-adjacent industries.
- Increasing the contribution of renewable energy sources in the energy mix.
- Enhance the competitiveness of the energy sector.

- Grow and capture maximum value from the mining sector.
- Localize promising manufacturing industries.
- Localize military industries.
- Increase the percentage of local content in non-oil sectors.

- Create and improve performance of logistic hubs.
- Improve local, regional and international connectivity of trade and transport networks.

Integrating Towards a Prosperous Future

Combining the four sectors in a single program is an ingenious idea conceived by His Royal Highness the Crown Prince, Prime Minister, and Chairman of the Council of Economic and Development Affairs. The integration of these sectors and the two focus areas is crucial for creating a thriving and diversified economy, increasing the contribution of these sectors to the Kingdom's GDP, and maximizing the added value. NIDL P works to align these sectors on the strategy level to ensure the maximum utilization of the inputs and outputs of each sector, as well as the development of execution mechanisms that ensure the realization of the Vision 2030 objectives.



NIDL P Strategy

The program relies on 4 important strategic pillars, which contribute to achieving the ambitious objectives of the program, and these pillars are:

1. Promote integration for the exploitation of resources, whether natural resources, assets, or human resources.
2. Raising competitiveness and productivity, providing the necessary capabilities to be a leading country world-wide.
3. Developing the system and improving operations to focus on investor needs and added value rather than focusing on investment only.
4. Maximizing internal and external interdependence and access to demand areas in global regions.

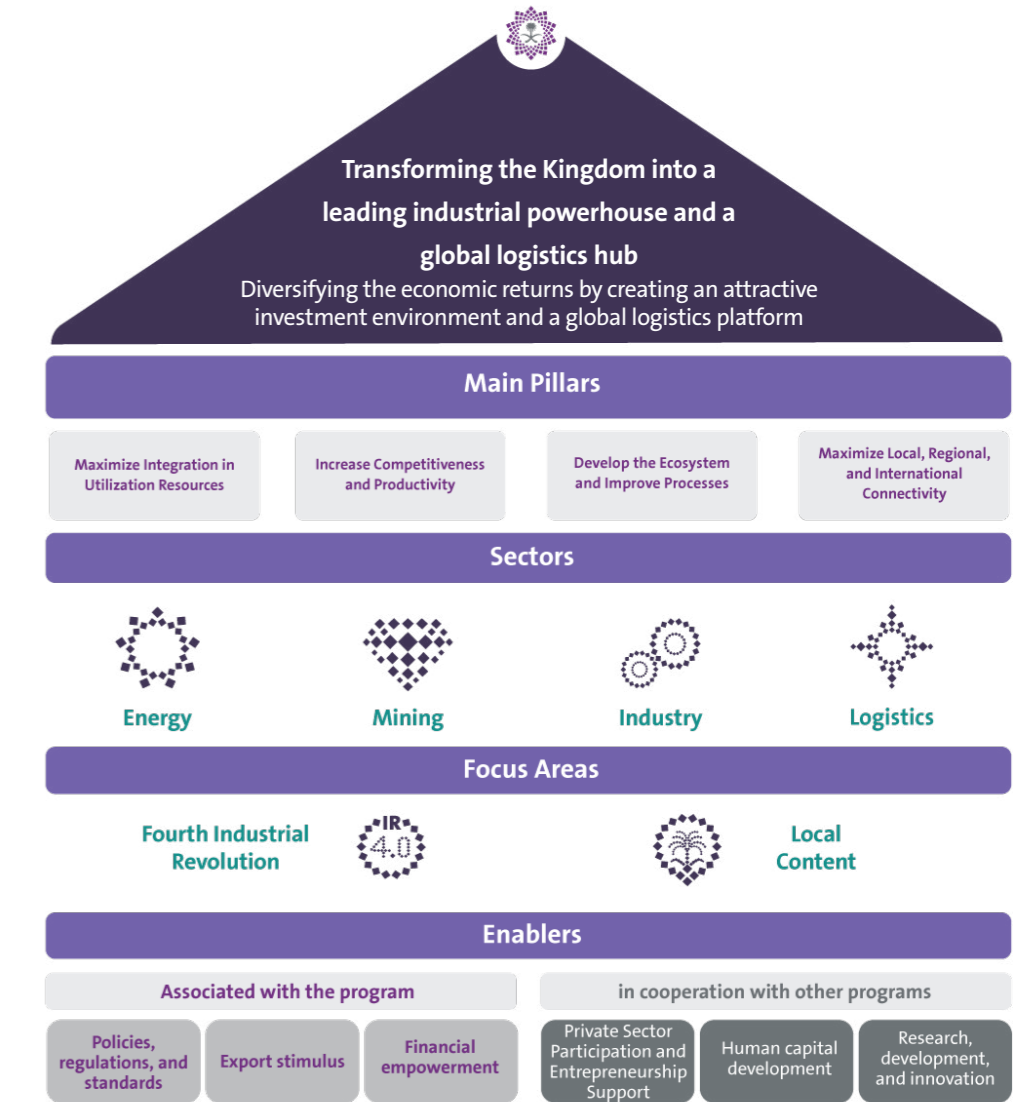
The strategy follows a development model:

That starts with:

Building on strengths, maintaining gains, and developing sustainable competitive advantages.

Relies on:

Factors that boost the competitiveness of various sectors in the short, medium, and long term.



Economic Indicators



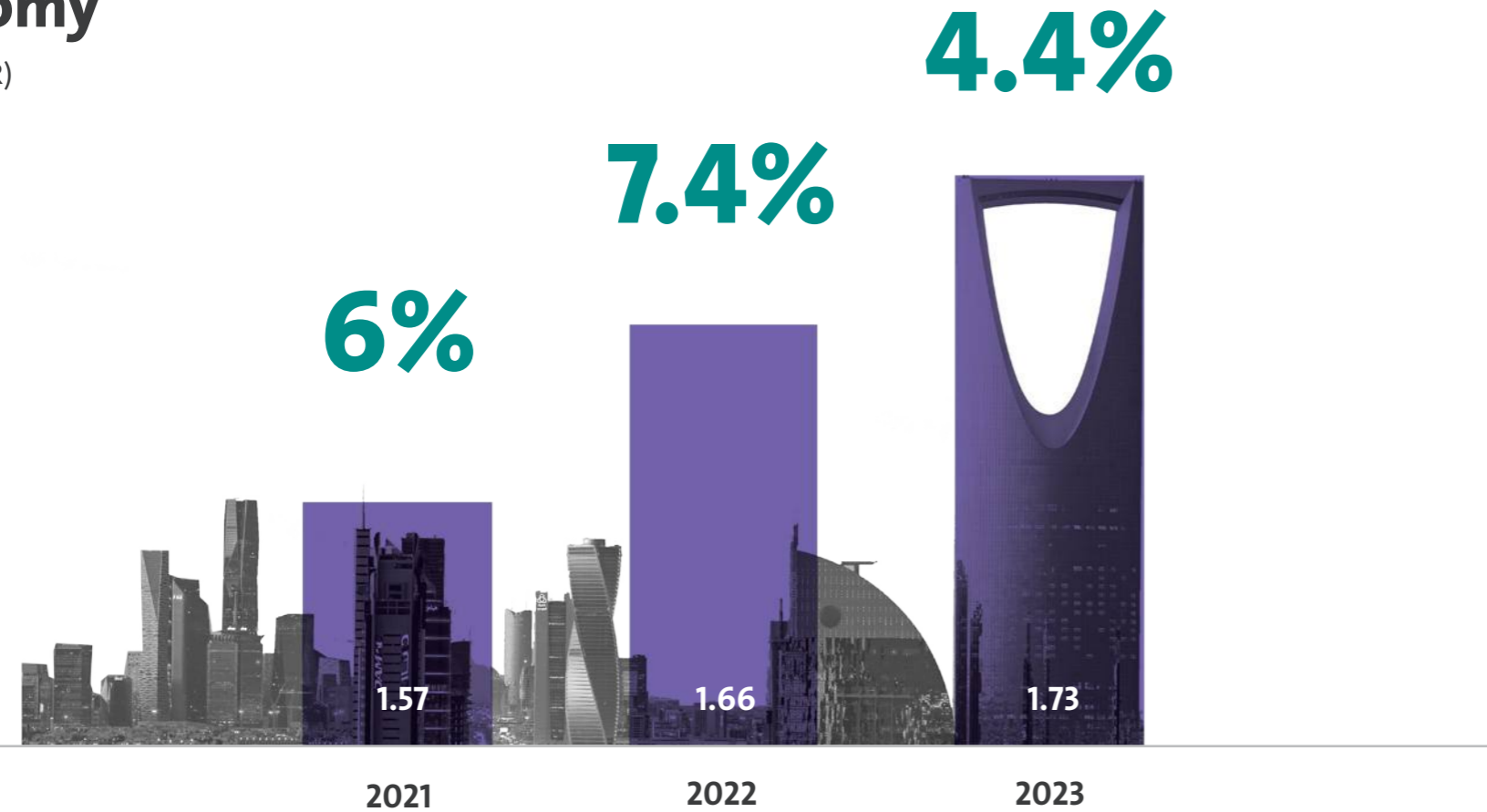
H.E. Faisal bin Fadhel Alibrahim

Minister of Economy and Planning

“Guided by Vision 2030, Saudi Arabia is well underway towards a new economic era and a comprehensive renaissance witnessed by the entire world. This revival is founded on enhancing the competitiveness of the national economy, the diversity of capabilities, and the distinctiveness of the investment environment. The Kingdom is also leveraging its strategic geographical location to diversify sources of income, boost the economy, and modernize infrastructure, regulations, and legislation. This has -so far- resulted in record numbers in total non-oil exports and GDP for the program’s sectors, accompanied by an increase in these sectors’ workforce that attracted cumulative investments, in addition to the competitive GDP growth rates.”

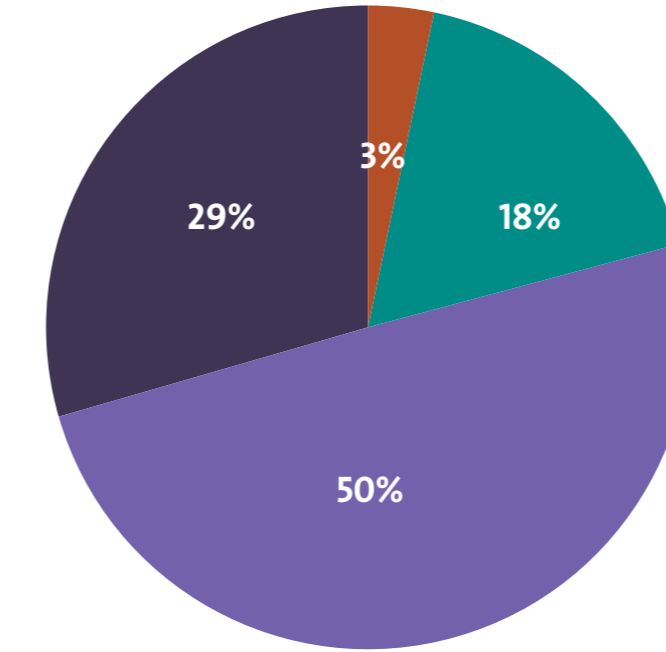
Local Economy

Non-oil GDP (billion SAR)



A constant growth in non-oil activities has resulted in a **4.4%** year-on-year increase, driven by **8%** growth in transportation, storage, and communication and **7%** growth in wholesale and retail trade, hotels, and restaurants. In 2023, other non-oil economic activities have also grown, reflecting the success of Vision 2030's main objective of diversifying, and stabilizing the national economy and boosting the non-oil sector.

Contribution of Main Economic Activities



50%

For the first time in the Kingdom's history, non-oil GDP accounts for 50% of GDP.

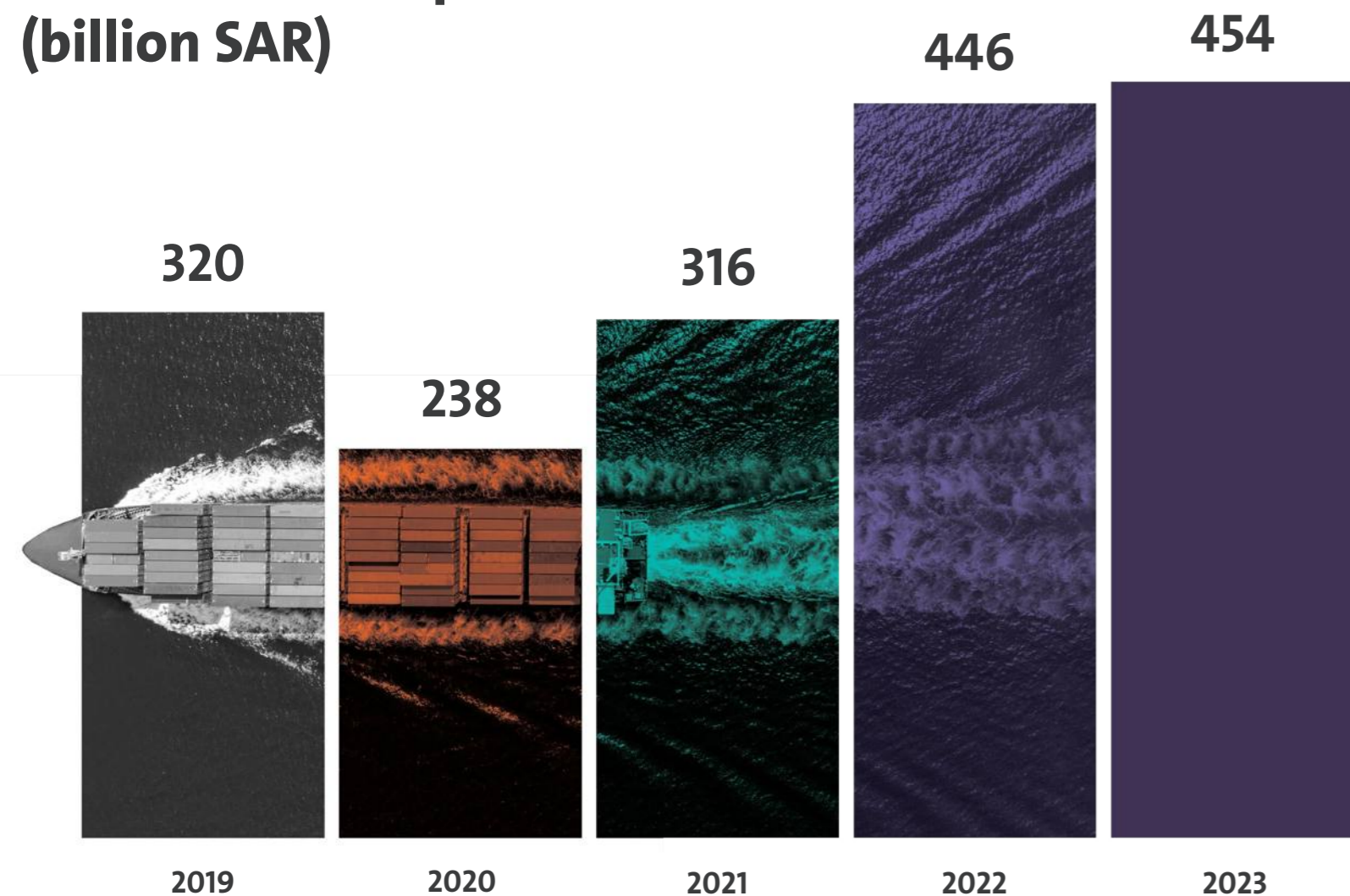
32%

The contribution of the program's sector activities to non-oil GDP.

- Non-oil activities
- Oil activities
- Government activities
- Net taxes on products

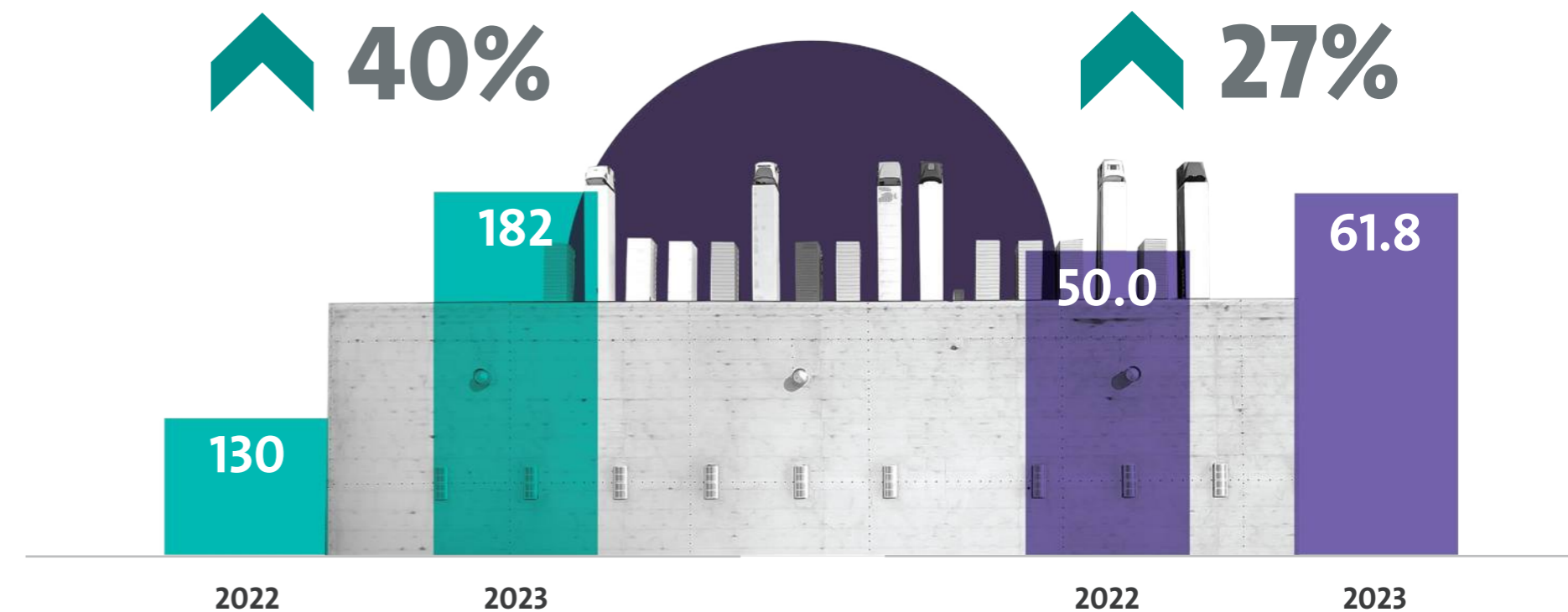
Source: General Authority for Statistics, Saudi Central Bank, and NIDLP Office analysis.

Total Non-Oil Exports (billion SAR)



Service Exports (billion SAR)

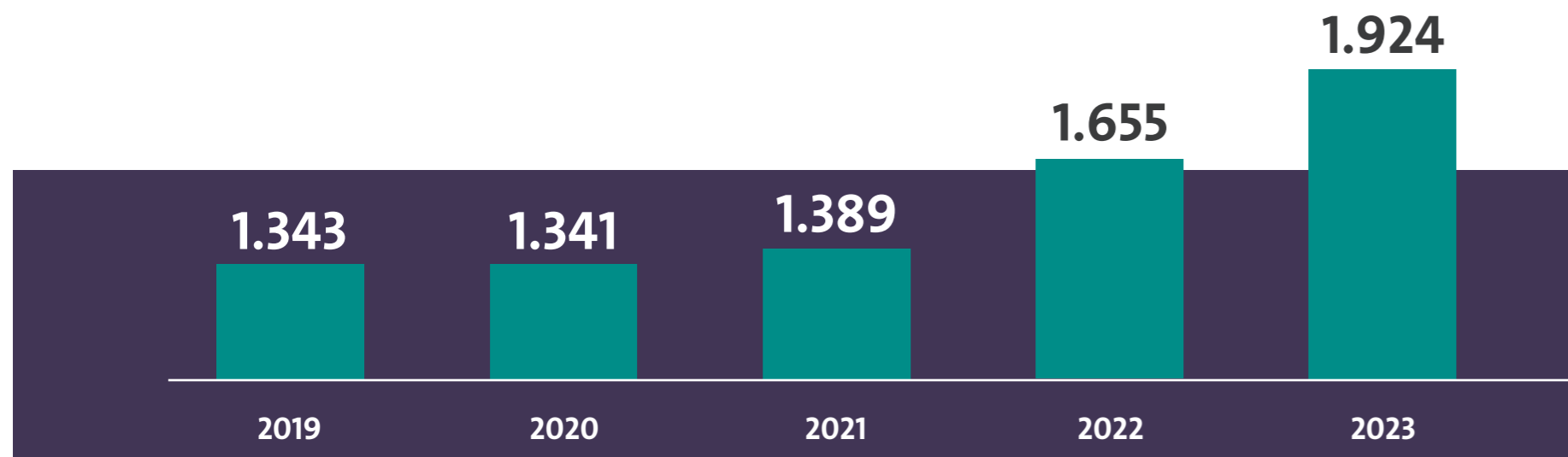
Re-exports (billion SAR)



Total non-oil exports have witnessed a **2%** growth in 2023 compared to the previous year, driven by the increasing service exports, which posted a historic value of 182 billion SAR, growing by **40%** year-on-year. Furthermore, re-export activities recorded unprecedented growth rates this year, up **27%** from the previous year. In turn, non-oil commodity exports fell by **-21%** on the back of a **-27%** drop in chemical exports.

Source: General Authority for Statistics, Saudi Central Bank, and NIDLP Office analysis.

The Total Cumulative Number of Jobs in the Program Sectors' Activities (Thousand Workers)



Total job increases in 2023

+ 269
thousand workers

Saudi workers increase in 2023

+ 113
thousand workers

The number of workers in the activities of the program sectors grew significantly in 2023 to over 1.9 million. The increase amounted to over 269,000 workers during the year, of which Saudi men and women accounted for more than 113,000 workers.

Female Saudi workers increase

+ 51
thousand

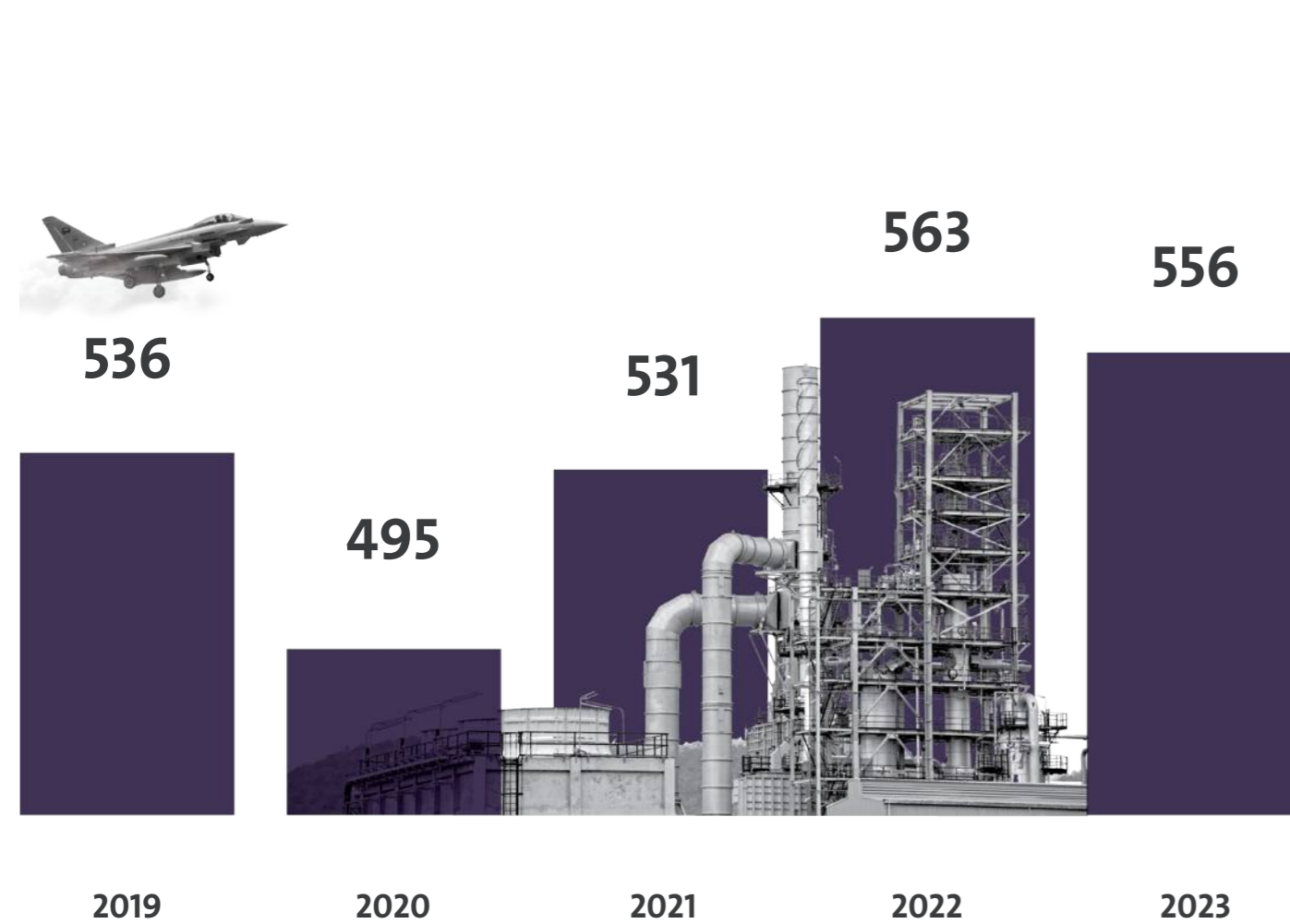
Male Saudi workers increase

+ 62
thousand

Source: General Authority for Statistics (GASTAT), The General Organization for Social Insurance (GOSI), and NIDL Office analysis.

GDP of the Program Sectors (billion SAR)

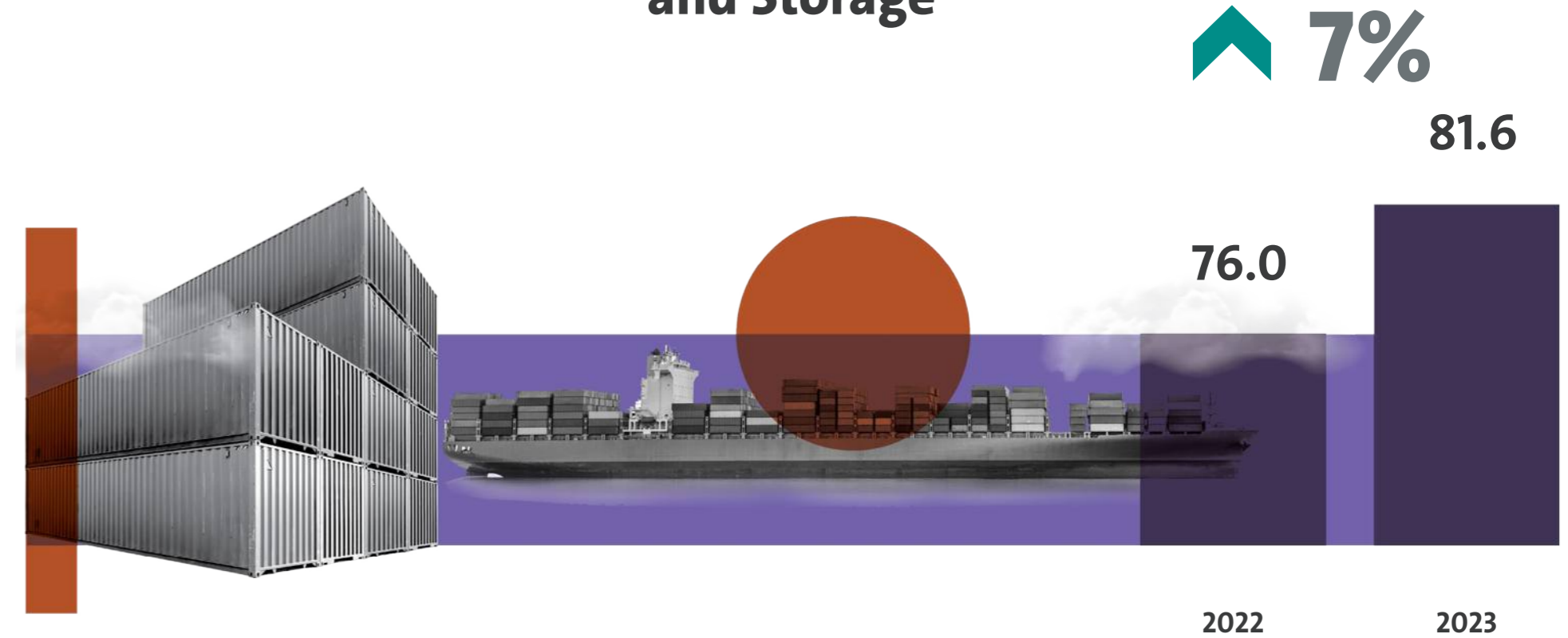
The moving chain methodology



Other Mining and Quarrying Activities



Transportation and Storage



GDP for NIDL sectors' activities marginally declined in 2023 year-on-year, impacted by a drop in oil refining manufacturing as a result of lower oil prices in the light of the slowing global economy growth.

Transportation and storage grew by **7%**, while other mining and quarrying activities increased by **6%**.

Source: GASTAT, NIDL Office analysis.

Energy Sector



“By 2030, Saudi Arabia will be a model for the production of all energy sources... It will be the best in terms of efficiency and effectiveness in fuel consumption.”

His Royal Highness
Prince Abdulaziz bin Salman Al-Saud
Minister of Energy

The Energy Sector Directions Aims to Maximize the Value Generated From the Sector By:



Strengthening the infrastructure of the Saudi electricity sector to promote economic growth.



Increasing the contribution of renewables in the domestic power consumption and reaching their targeted share in the optimal energy mix along with natural gas; building national capacity to make the Kingdom a global leader in the renewable energy sector; and developing the legislative and regulatory structures that encourage other complementary energy sectors to maximize the overall national economic return.



Maximizing the added value of increased production and distribution capacity of gas, ethane, and natural gas liquids.



Optimizing the use of hydrocarbon resources in the Kingdom to support its national economy and environmental commitment by meeting local hydrocarbon demand, exporting, increasing the overall energy efficiency, and diversifying energy sources in the national energy mix.

Our Objectives

Increasing gas production and distribution capacity.

Increasing the contribution of renewable energy sources in the energy mix.

Promoting the energy sector's competitive edge

2030 Aspirations

Optimum utilization of hydrocarbon resources in the Kingdom to support the national economy and environmental commitments.

Provide high-quality electricity to consumers competitively to achieve the sustainability of the sector.

Achieving the Kingdom's global leadership in the renewable energy sector.

Increasing the contribution of energy sources to around

50%

of the electrical power generation to achieve the power production optimal mix.

Raising the percentage of local content in the oil and gas sector to

75%

Signing a power purchase agreement for 6 new projects with a capacity of 6.2 gigawatts

aimed at increasing the proportion of renewable energy to reach the optimal mix, enhancing the efficiency of the electricity sector, and reducing carbon emissions.

Saudi Arabia's First Natural Gas Storage Project

Initiating gas injection at the Hawiyah gas storage project in Unaizah, with a storage capacity of 2.0 billion standard cubic feet of natural gas per day, to be reintroduced into the Kingdom's Master Gas System (MGS).

وزارة الطاقة
MINISTRY OF ENERGY



Completion of the final commissioning of the Jeddah, Rabigh, and Sudair solar power plants

with a total capacity of 2.1 gigawatts, aimed at increasing the proportion of renewable energy to reach the optimal mix, enhancing the efficiency of the electricity sector, and reducing carbon emissions.



A Vision to Be Told

Instilling Social Solidarity by Replacing Air Conditioners

Muwasah Qarah, the social services charity, has worked to consolidate the concept of social solidarity. Helping beneficiary families achieve domestic and social stability and security, the charity offers them specialized activities and services as per high quality standards. Additionally, the Air Conditioning Replacement Initiative was launched to improve energy efficiency while supporting local content and national industry. As such, the organization helped over 120 families replace 248 air conditioners, thus positively impacting the lives of these families as follows: Replacing old air conditioners with new ones, saving energy, reducing electricity bills, increasing safety, and easing the living burdens on these families.



Ibrahim Ali Al-Abd Al-Rida
Executive Director of Muwasah Qarah



Mining Sector



H.E. Bandar bin Ibrahim Al-Khorayef

Minister of Industry and Mineral Resources

“The Kingdom will become a major driver of mining at the regional level.”

The Mining Sector Directions Aim to Maximize the Value Generated From the Sector By:



Developing regulations and legislations and improving capabilities to enhance the mining sector's competitiveness.



Increasing exploration expenditure to global levels by attracting private sector investments, along with dedicated support from the proposed exploration fund as part of the sector's initiatives.



Creating job opportunities and fostering national talents.



Enhancing the beneficiary experience and satisfaction by upgrading services, providing relevant data in a highly reliable digital format, facilitating its access, and reducing the time required to issue detection licenses.



Providing the required geological data via the Arabian Shield geological survey as part of the Regional Geological Survey Program.



Maximizing the added value of mineral ores by establishing value-added mining chains in collaboration with the private sector, which would offer excellent investment possibilities.

Our Objective

Grow and capture maximum value from the mining sector.

2030 Aspirations

Maximizing the contribution to GDP to reach

176 billion SAR

219 thousand jobs

to be generated by the mining sector

Improving the beneficiary experience by increasing satisfaction with the provided services and reducing the detection licenses issuance period to

60 days

Top Achievements



Launching the Nuthree Mining Exploration Incubator Initiative

This initiative aims to empower young explorers and local companies in the mining sector, the incubator has already admitted 15 companies and individuals and commenced its work, which includes training sessions and field visits, assisting companies in obtaining exploration licenses, and supporting individuals in setting up exploration companies.

More than **30%**
of the Arabian Shield

By the end of 2023, more than 30% of the Arabian Shield was mapped as part of the Geological Survey Program.





A Vision to Be Told

Our lands.. Giving Beyond Limits..



Scan to watch



The Geological Survey General Program initiative was launched to explore the riches that Allah has bestowed on the gracious land of Saudi Arabia. This initiative has worked to maximize the impact of the mining sector, making it the third pillar of the Saudi economy.

An Inspiring Journey of New Exploration

In the mining industry, success is often measured by the ability to navigate challenges while adhering to the highest standards and contributing to the visioned progress. As for the business world, partnership and collaboration are the foundation of success. A shining example is the success story of Masharef Advanced Company for Geological Consulting & Mining, where joint work and cooperation are enabling a bright and prosperous future in the mining industry, which has become the third pillar of the national economy.

This is an inspiring journey with 4 months of interactions, during which Masharef's activity was boosted with the support of the Nuthree Mining Exploration Incubator program, which allowed the company to connect with new customers and deepen its existing relationships.

Through its active engagement in the incubator, Masharef secured contracts for over 10 exploration and evaluation projects for various mineral ores in a very short span. The projects have primarily focused on the exploration and evaluation of gold, copper, iron, and other minerals, as well as industrial rocks.

Afterward, the company participated in 3 mining conferences inside the Kingdom and abroad, establishing its position as a leading company with a major role in the field of mining investment and exploration.



Ayman Siraj

CEO, Masharef Advanced Company
for Geological Consulting & Mining



Industry Sector



H.E. Bandar bin Ibrahim Al-Khorayef

Minister of Industry and Mineral Resources

“In four years, we have proven that working with different entities is the best way to achieve the industry sector goals, transforming various dreams into reality.”

The Industry Sector Directions Aim to Maximize the Value Generated From the Sector By:



Maximizing the added value of the economy by increasing local manufacturers' contribution to government purchases as well as the capital and operational expenditures of industrial government companies, developing human capital and training the workforce, and attracting investments to localize industries in the Kingdom.



Protecting national industry from dumping and unfair competition, improving local product efficiency to compete regionally and worldwide, and accordingly promoting the development of promising industries and exports.



Building a resilient, competitive, sustainable, and private sector-led industrial economy that improves macroeconomic indicators by expanding promising industries (such as pharmaceuticals, medical devices, automotive), oil and gas-related industries (such as specialty chemicals, plastics, rubber), and military industries. Moreover, creating a competitively enabling environment, characterized by outstanding infrastructure, flexible and transparent legislative and regulatory frameworks, research, and innovation capabilities that meet the requirements of industrial facilities of all sizes.



Developing qualitative enablers, such as establishing special economic zones, boosting the quality of economic and industrial cities, and improving regulations and legislation to enhance competitiveness and further attract regional and international investments.



Localizing high-quality industries that boost the national economy and its adaptability to any crises or global fluctuations, along with industries that the Kingdom can lead globally and regionally, all while achieving leading industrial integration on the regional level.

Our Objective

Develop oil and gas-adjacent industries.

Localize promising manufacturing industries.

Create special zones & rehabilitate economic cities.

Localize military industries.

2030 Aspirations

Attaining the capacity to manufacture **280** thousand cars annually

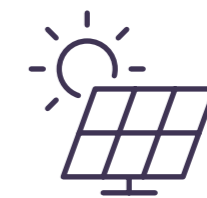
Localizing 40% of added value chains, including automotive parts and the components required by both electric and internal combustion engine vehicles.

Localizing **50%** of military and security spending

Reaching 50% in the localization of military and security spending.

Localizing **40%** of the pharmaceutical industry

Localizing 40% of the market value in the pharmaceutical industry, along with raising the percentage of the localized medical devices and supplies industry to 15%.



Establishing the renewable energy industry as one of the leading industries in the Kingdom.

Meeting **85%** of the local demand

For the Kingdom to be a regional center for food industries, meeting 85% of the domestic demand for these industries and enhancing the aquaculture sector's production capacity.

Localizing **70%** of the supply chain

Localizing 70% of the future supply chain for basic and intermediate chemicals.

Inaugurating the First Factory of its Kind in Saudi Arabia



LUCID

Lucid, an electric vehicle manufacturer, has opened its first automotive manufacturing plant in Saudi Arabia, aiming to produce over 155,000 electric vehicles annually. This comes as part of the Kingdom's drive to become one of the world's top 5 EV producers and exporters, its quest to diversify its economy, along with its commitment to the global efforts towards reducing carbon emissions. Through its manufacturing facility, Lucid will create new job opportunities for local talent and support the growth of the Kingdom's automotive supply chain. In addition, Lucid's EV development activities will contribute to the Saudi Green Initiative's goal of ensuring that at least 30% of cars in the Kingdom are electric by 2030.

5 Special Economic Zones Contributing to the Diversification of the Local Economy



هيئة المدن والمناطق الاقتصادية الخاصة
Economic Cities and Special Zones Authority

His Royal Highness the Crown Prince, Prime Minister and Chairman of the Council of Economic and Development Affairs, has launched 4 new special economic zones, bringing the total number to 5 zones. Each zone will help develop and diversify the Saudi economy and improve the investment environment, thereby strengthening the Kingdom's position as a leading global investment destination. This will also open up new prospects for development and support vital and promising sectors, drawing on the competitive advantages of each economic zone.



Investments exceeding 12 billion SAR

Signing over 800 new contracts, with an investment volume of over 12 billion SAR, creating nearly 38,000 jobs.



الهيئة العامة للصناعات العسكرية
General Authority for Military Industries

10 investment opportunities in military industries

Enabling investors from around the world to invest in this vital sector as part of the objective for localizing over 50% of military spending by 2030.

A Vision to Be Told

Our cafes could become factories



Saud Al Murshidi
CEO, Sakura Cafe and Factory

Sakura cafe in Hail has turned into a cafe and a factory specializing in baked goods. With increasing branches and increasing daily production that exceeded 8 thousand products, Sakura cafe boasts 24 local employees. Through the 'ready-built' factories initiative, Sakura created an inspiring success story in the land of Aja and Salma.

The Right Path Towards Success

It is not only to know the goal, but also how to get there. Sarh Export had big dreams, yet it is not easy for any organization today to create a niche for itself in a world buzzing with numbers, competition, strategies, and intersectional systems. However, Sarh Export had a full understanding of its goals and how to shape them. It assigned teams to attend 9 training workshops organized by the Saudi Export Development Authority (SEDA), including export business planning, marketing & e-commerce, supply chain management and logistics. These workshops contributed to: Enhancing the organization's export know-how; strengthening its competitiveness in the market; and deepening its understanding of the international market, the marketing mix, and methods of penetrating global markets; in addition to applying pricing strategies; and enhancing Saudi non-oil export channels, in line with the ambitions of Vision 2030.



SARH EXPORT COMPANY



Promising Industries

EV Manufacturing





Promising Industries

EV Manufacturing

In 2023, Saudi Arabia made a major shift in the industrial sector by investing in promising industries, especially the EV sector, with a major focus on global strategic partnerships, which supports the goals of Vision 2030. This drive towards the EV sector reflects the Kingdom's keenness to become a key global player in this industry, along with supporting its efforts to diversify the national economy and promote sustainability and innovation. In this context, several agreements have established the Kingdom as a major hub for this vital and important sector and an attractive environment for promising and quality investments.

LUCID



Saudi Arabia Embracing Automotive Factories

In its first phase, the plant has the capacity to assemble

5,000
cars annually

Lucid
EV Manufacturer

LUCID

2018

The Public Investment Fund (PIF) invested over **\$1 billion** in the company since 2018.

2023

The company opens its **first factory** in Saudi Arabia, in King Abdullah Economic City.

2030

The company aims to produce **155,000** electric vehicles annually by 2030.



Ceer
EV Manufacturer

CEER



Ceer, Saudi Arabia's electric vehicles company, has made significant advances and signed several strategic agreements:

November 2022

- Launching Ceer as a joint venture between PIF and Foxconn.
- Obtaining technology licenses from BMW for use in the vehicle development process.

June 2023

A strategic partnership with King Abdullah University of Science and Technology (KAUST) to develop the smart mobility industry and drive innovations in the automotive industry.

August 2023

Ceer received an industrial license from the Ministry of Industry and Mineral Resources to establish an EV manufacturing facility on an area of over one million square meters in the Industrial Valley of King Abdullah Economic City (KAEC).

October 2023

Ceer announced a partnership with Siemens Digital Industries Software, under which Siemens provides Ceer with its specialized Xcelerator software to support the engineering operations involved in the design of EVs.



A strategic partnership with King Abdullah University of Science and Technology (KAUST)



A cooperation agreement with Siemens Digital Industries Software

From Importing Cars to Exporting Them

Hyundai Motor Company



The Public Investment Fund (PIF) and Hyundai Motor Company (Hyundai) signed a joint venture agreement to establish a highly automated vehicle manufacturing plant in Saudi Arabia.

The initiative is part of the Kingdom's efforts to shift from **importing cars to exporting them**, with a particular focus on EVs.

The joint venture aims to manufacture

50,000

vehicles annually

including both internal combustion engine (ICE) and electric vehicles (EV).

The estimated investment in the project exceeds

1.8

billion SAR

Laying the foundation for the plant is planned to take place in 2024, with the production expected to begin in 2026.

Pirelli Tire S.P.A (Pirelli)



The Public Investment Fund (PIF) and Pirelli Tire S.P.A (Pirelli) signed a joint venture (JV) agreement to build a tire manufacturing facility in Saudi Arabia.

PIF will hold a **75%** stake in the new JV with Pirelli holding the remaining 25% and acting as a strategic technology partner to support the development of the project by providing technical and commercial assistance.

The plant is expected to initiate production in 2026.

- The JV will manufacture high-quality tires for passenger vehicles, under the Pirelli brand,
- along with manufacturing market tires under a new Saudi brand targeting the domestic and global markets.

The total investment in the JV is around

2

billion SAR



Saudi Arabia Automotive Industry: Future Facts



Saudi Arabia's market share will be close to **50%** of total GCC sales

The Kingdom is expected to account for 50% of car sales in the GCC region by 2025.

Annual production of **300,000** cars

The national strategy for the automotive industry aims to establish two EV factories with an annual production capacity of 300,000 vehicles.

3 agreements for supplying EV cars to rental companies in the Kingdom

The Transport General Authority led the signing of 3 agreements to supply electric vehicles to rental companies in the Kingdom:

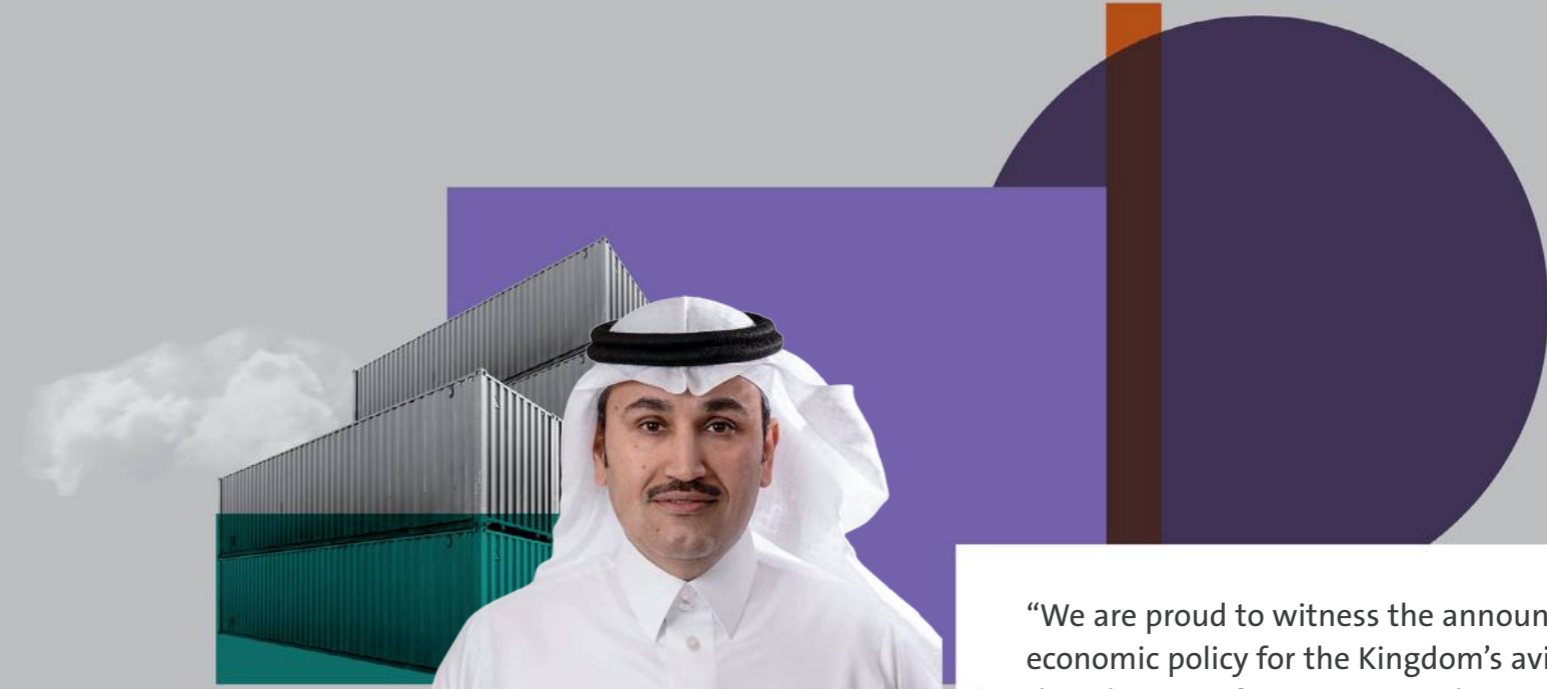
- The first agreement was signed between Naghi Motors Company and Al-Moftah Car Rental Company.
- The second agreement was inked between Almajdouie Motors Company and Budget Rent a Car Company.
- The third agreement was concluded by Almajdouie Company with Yelo Rent a Car Company.

These agreements aim to promote the use of electric vehicles and support environmental policies.

Industrial localization of **13** components

across different levels of the automotive supply chain.

Logistics Sector



H.E. Saleh bin Nasser Al-Jasser
Minister of Transport and Logistic Services

“We are proud to witness the announcement of the economic policy for the Kingdom’s aviation sector and the adoption of economic regulations for airports, ground services, cargo and air transportation services. These national efforts aim to enhance the sector’s competitiveness, improve the investment environment, and raise the performance efficiency of airport facilities and air carrier services. This is inline with the objectives of the aviation strategy emanating from the National Transport and Logistics Strategy.”

Logistics Sector Directions Aim to Maximize the Value Generated From the Sector By:

Our Objective

2030 Aspirations



Create and improve performance of logistic hubs

Boosting the Kingdom's position as a global logistics hub, as the Kingdom benefits from a strategic geographical location in the middle of trade lines, linking 3 continents (Asia, Europe, and Africa).

Improving the logistics licensing process and legislation.

Improving integration with modes of transport by strengthening the links between sea, air, road, and rail transportation, which will enhance goods and freight services.

Improving the Kingdom's ranking in the Logistics Performance Index from 55th to the top ten, ensuring its regional leadership.

Improve local, regional and international connectivity of trade and transport networks

Adopting advanced logistics services to reduce costs related with transporting and storing Saudi-made goods, thus encouraging local industry initiatives and attracting new industrial investors.

Improving connectivity with neighboring countries, which will increase the attractiveness of the Saudi market to individual investors, further facilitating transportation of people and goods.

Investment in smart technologies (such as automation across ports and logistics infrastructure), to facilitate, accelerate, and advance operational efficiency.

40 Million standard containers

Goods handling across Saudi ports.

330 Million passengers

Numbers of passengers through the Kingdom's airports.

Among top **10** countries

The Kingdom's Ranking in the Logistics Performance Index.



Reduced costs of transporting goods and passengers to accommodate the volume of passengers and handled goods.

Launching the master plan for logistics centres

His Royal Highness, Crown Prince, Prime Minister, and Chairman of the Council of Economic and Development Affairs, has launched the Master Plan for Logistics Centres, aimed to transform the Kingdom into a global logistics hub. The plan included 12 centers in Riyadh Region, 12 in Makkah Region, 17 in the Eastern Region, and 18 distributed in the rest of the Kingdom.

7 billion SAR for development and operational projects

Laying the foundation stone for upgrading and developing two container terminals at King Abdulaziz Port in Dammam under the Build-Operate-Transfer (BOT) concession valued at over 7 billion SAR.

The Kingdom advances

17 ranks

The Kingdom advanced in the international ranking in the Logistical Performance Index (LPI), issued by the World Bank, to the 38th place after making significant strides in performance efficiency across a number of sub-indicators, most notably: Logistics Competence & Quality, Tracking and Tracing, Timeliness, Customs, Infrastructure, and International Shipments.



The launch of Riyadh Air as a new national carrier, which contributes to enhancing the Kingdom's strategic location connecting three of the world's most important continents.



A Vision to Be Told

Empowering Our Human Resources in Future Growth Sectors



Atheer Alshehri
Logistics Supervisor at Aramex

High efficiency logistics is one of the most critical future growth sectors, a key driver of the national economy, and an important enabler for unlocking the potential of sectors. However, it will not function properly without passionate and knowledgeable human resources; hence the idea of launching the Saudi Logistics Academy.

Aspiring Leaders for a Bright Future

Women have always had a prominent role in the Kingdom's history, thus it was imperative to activate their involvement in shaping the Kingdom's prosperous future. This is what sparked Mashaal Al-Essa's passion, as she gazed towards the future with eyes eager to succeed. Not content with earning her BA from Princess Noura Bint Abdulrahman University in Business Administration, she worked her way up to represent Saudi Arabia in one of the the world's largest pharmaceutical companies. Al-Essa succeeded in managing and implementing new procedures to enhance and optimize the shipment of pharmaceutical products. Building on this success, Mashaal worked at Takamol Holding and then Airbus, before fulfilling her ambition by joining the Future Women Leadership Program, a program of the Saudi Logistics Academy. Mashaal is determined to capitalize on her efforts in a promising sector that contributes to the development of her country's economy, under an ambitious vision that values and incentivizes talent.



Mashaal Al-Essa
Logistics Strategy Manager
Airbus

AIRBUS

The Fourth Industrial Revolution



H.E. Abdullah bin Amer Al-swaha
Minister of Communications and
Information Technology

“Our youth are the true wealth
of our nation, the ones who will
create the unthinkable in the face
of change.”

The Fourth Industrial Revolution Initiatives Aim to Maximize the Value Generated From the Sector By:



Establishing a supportive legislative environment by developing the necessary legal frameworks to expand the scope of 4IR applications, enhancing the development of the program sectors.



Developing the 4IR technologies ecosystem, expanding existing value chains, and creating new ones.



Developing the infrastructure of communications and digitalization technologies as a major enabler for the growth and diversification of 4IR applications in various fields.

Our Objective

Development of the digital economy for enabling the Fourth Industrial Revolution.

2030 Aspirations



Becoming a leading country in adopting and innovating technologies.

Increasing production efficiency and competitiveness, along with enhancing sustainability.

Activating **5**

national capability centers for the Fourth Industrial Revolution Technologies.



Inaugurating the Industry 4.0 capability center in the 2nd industrial city in Riyadh

Under the supervision of the King Abdulaziz City for Science and Technology (KACST), after hosting 75 workshops to introduce 4IR technologies and use cases, 60 technical consultations, and 80 product development services. The center is expected to become a major destination for industrial workers, where they can develop their facilities using automation and modern technologies, along with upskilling the workforce to drive local and global competitiveness.

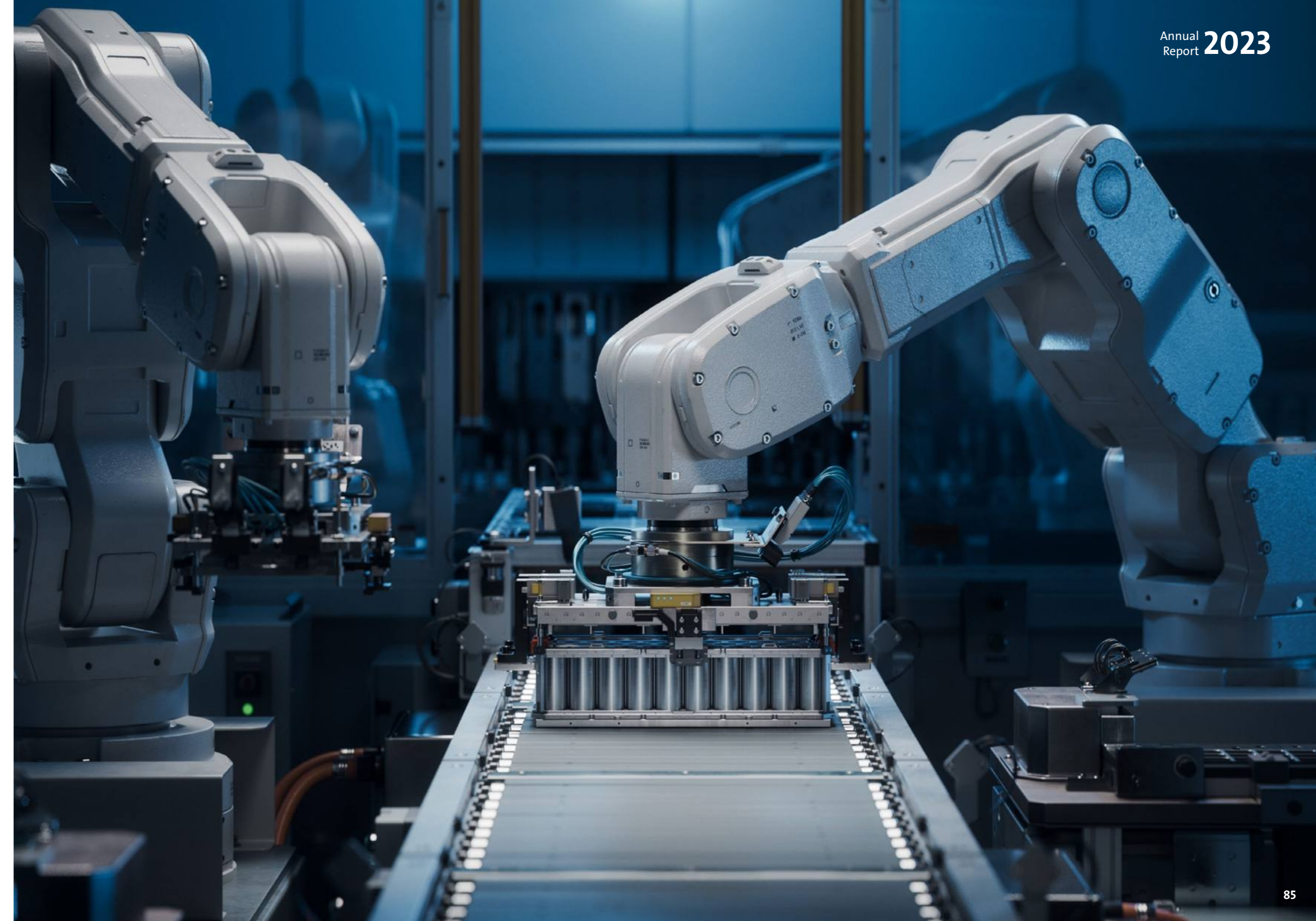


Fiber optic network in 4 industrial cities



Completing the additive manufacturing initiative

Completing the Additive Manufacturing Initiative, which included a digital inventory database. The database contains over 1,000 parts that have been scanned, digitally modeled, and made available to qualified local companies to produce 3D-printed parts. Workshops were also organized to showcase investment opportunities for additive manufacturing.



A Vision to Be Told

Technological Innovations to Boost Competitiveness



Ahmed Al Malki
Manufacturing Capacity Center Supervisor
King Abdulaziz City for Science and Technology (KACST)

A paradigm shift in the industrial transformation the Kingdom has been witnessing since the introduction of Vision 2030, launching the Industry 4.0 capability center has come as an advanced and accelerated move towards adopting innovation and sustainability in the industrial and logistics sectors. An inspiring story with the future at its heart, showcasing a glimpse of our nation by tomorrow.

Strides Toward the Future

Better to be one step ahead of the future than to wait for it. That's the premise of Camel Step, one of the first specialty coffee companies in Saudi Arabia. Founded in 2013, the company drive for excellence encouraged it to identify bottlenecks and foresee potential challenges. Accordingly, the café received a Smart Industry Readiness Index (SIRI) assessment through Industry 4.0 capability center, then began working on addressing deficiencies and developing solutions to the challenges. These measures had a positive impact on expanding the production lines and enhancing the café's competitiveness in the specialty café market by boosting the products' efficiency and quality. Today, Camel Step has become a pillar of the specialty coffee market, with a focus on spreading knowledge by educating staff on coffee types and sources, and securing supply chains to ensure continuity and quality.



CAMEL STEP COMPANY



Local Content



H.E. Bandar bin Ibrahim Al-Khorayef

Minister of Industry and Mineral Resources

“We will localize 90% of Saudi Arabia’s need for insulin, with local content being a key part of the successful negotiations.”

هيئة المحتوى المحلي
والمشتريات الحكومية
Local Content & Government
Procurement Authority



Maximizing local content in ICT

Issuing a list of opportunities to maximize local content in the ICT sector and increase its contribution to the sector.

Launching the second edition of the Local Content Award



Future Cities We Build With Our Own Hands



Scan to watch



Upon its establishment in 2007 by Saudi hands and qualified national talent, Al-Fanar's owner never imagined that the day would come when the factory could compete with international factories in terms of quality, efficiency, and speed.

The Opportunity Awaits!

The opportunity may be right there, but one doesn't see it. This is what might come to your mind when you know that there are small and medium enterprises (SMEs) struggling in the market to prove their potential and maintain their stability and presence. However, Jadeer service made everyone recognize the opportunities at hand. Helping SMEs easily access procurement opportunities, Jadeer is a free e-service aimed at preparing and empowering SMEs to prove their capabilities and potential to service partners from both the public and private sectors.

Saudi Ground Services Company (SGS) is a partner of Jadeer on two grounds:

- SGS requires Jadeer certification as a prerequisite for qualifying and contracting with SMEs.
- The company was able to conclude over 60 deals with a number of eligible Jadeer-certified SMEs for fundings exceeding 1 million SAR in 2023 and 2024. SGS also referred several enterprises to obtain this certification.



SAUDI GROUND SERVICES COMPANY (SGS)



A Vision To Be Told



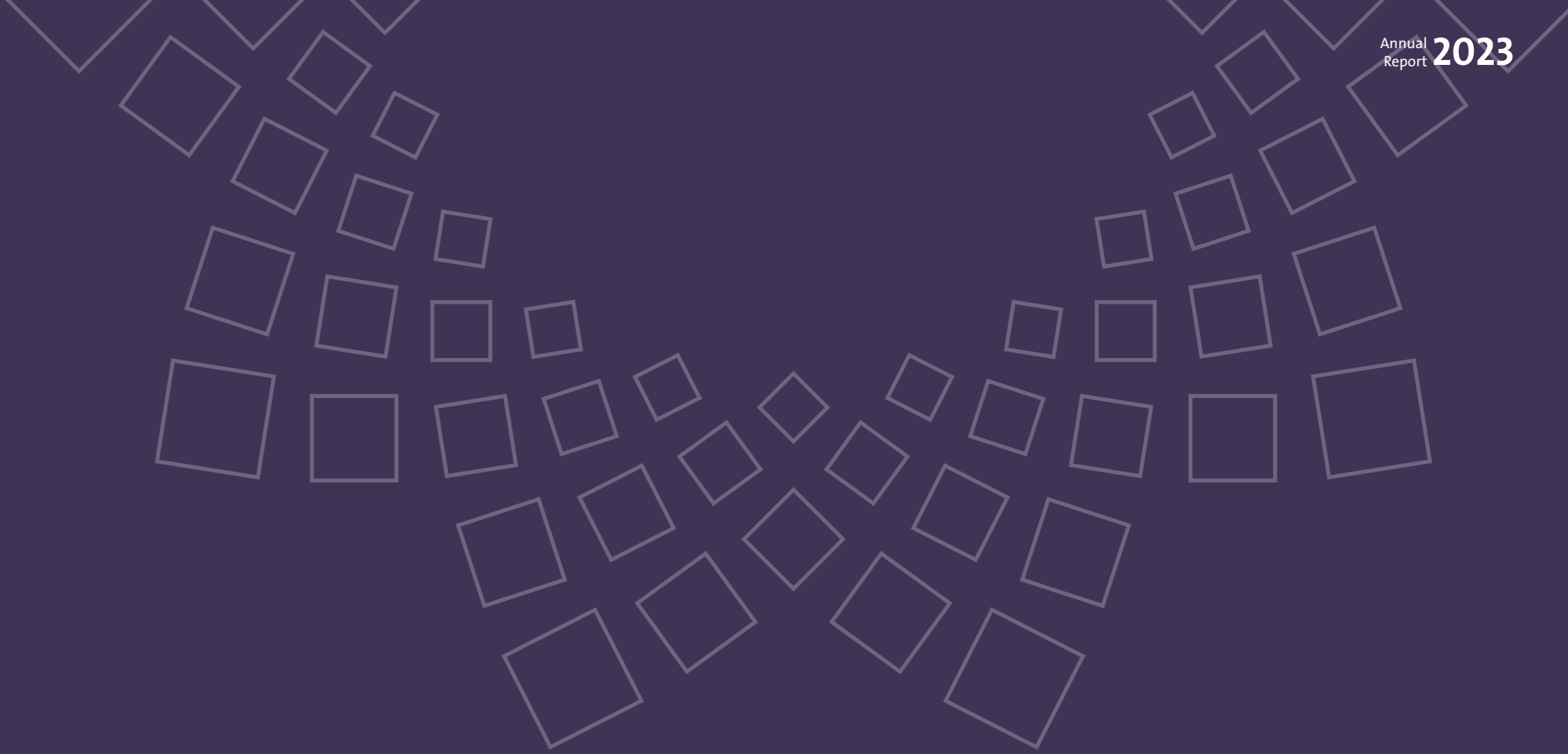
SPC
سدير
للأدوية

Sudair
Pharmaceutical
Company

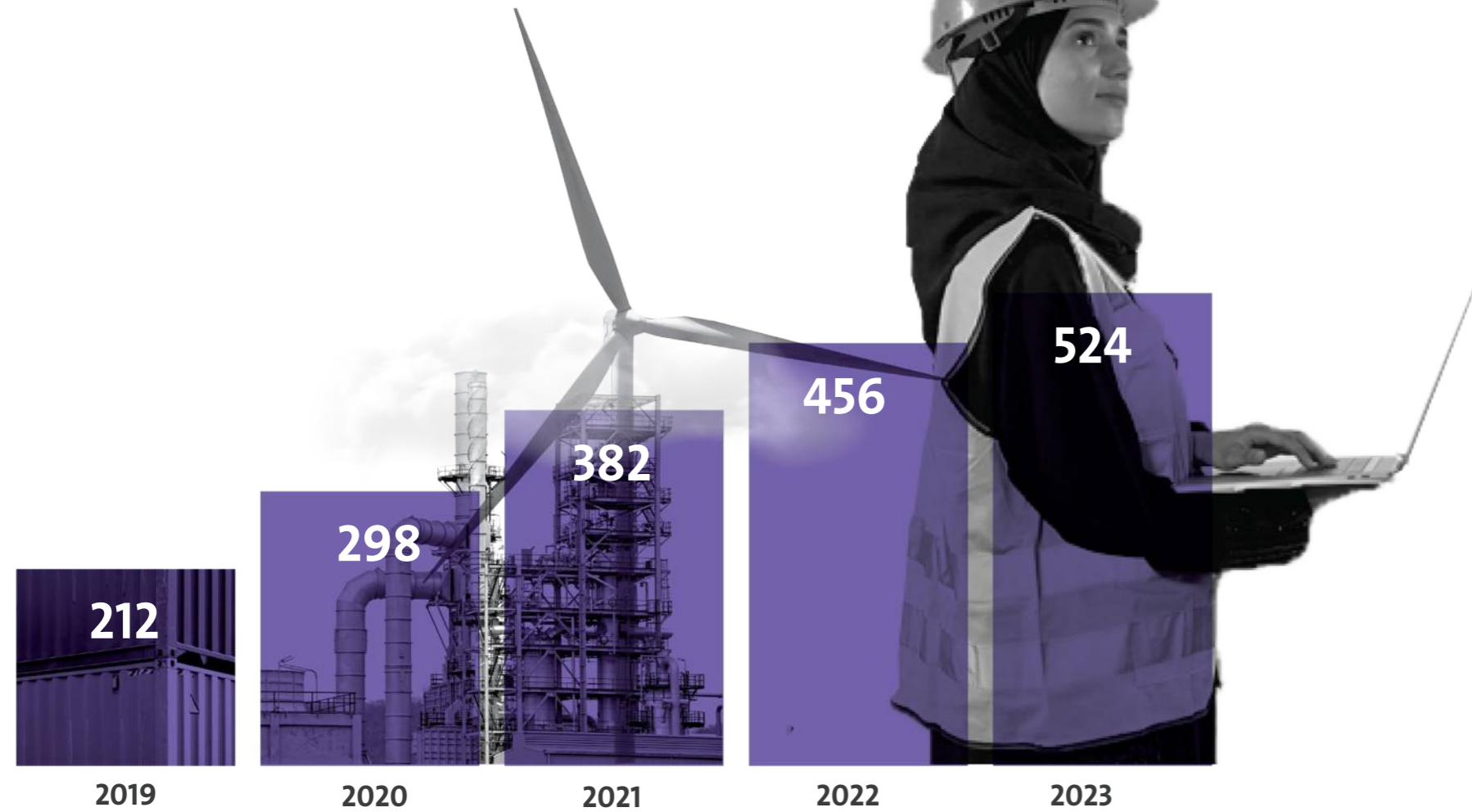
Visionaries Have A Mission That Drives Them Towards Success

Dr. Yasser Alobaida unlocked his ambitions with full force, driven by Vision 2030 and its unlimited potential. His dream began with specializing in medicines for chronically ill children. Caring about children entails a curiosity to try and experiment, not to be afraid to make mistakes, but to fail and get back up again. Accordingly, Dr. Yasser followed his passion through continuous research in the pharmaceutical markets, working on feasibility studies, attending conferences and visiting pharmaceutical factories, and tirelessly learning. He finally reached the desired success by establishing the Sudair Pharmaceutical Company, through which he helped support the Kingdom's future ambitions to localize the insulin industry by 90%.

Attracting Investment



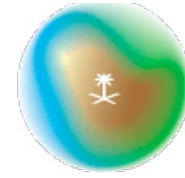
Cumulative Total Completed non-government Investments In NIDL P's Sectors (Billion Riyals)



+68
billion SAR

**Additional investments
achieved in 2023**

وزارة الطاقة
MINISTRY OF ENERGY



47+
billion SAR

These include several power purchase agreements by the Ministry of Energy to supply several renewable energy projects in different regions of the Kingdom, as well as gas-fired power plant projects to reach the optimal energy mix.

وزارة الصناعة
والثروة المعدنية
Ministry of Industry and Mineral Resources



3.3
billion SAR

The commercial production of the Mansourah-Massarrah, the largest gold project in the Kingdom of Saudi Arabia, has commenced, and will contribute to Saudi economy, and enhance kingdom position as a global mining hub



12+
billion SAR

Attracting investments of over 12 billion SAR through the signing of over 800 new contracts, creating nearly 38,000 jobs.



2.1
billion SAR

The value of investments attracted by the Saudi Ports Authority (Mawani) to enhance the role of Saudi ports as a linking hub with regional and international ports to establish logistics zones and provide high-quality maritime services.

الهيئة الملكية
للجبيل وينبع
Royal Commission for Jubail & Yanbu



2+
billion SAR

The value of developing industrial projects in the cities of the Royal Commission for Jubail and Yanbu (RCJY), as part of efforts to boost and empower the chemical and support industries.



هيئة المدن والمناطق الاقتصادية الخاصة
Economic Cities and Special Zones Authority

522
million SAR

The Economic Cities and Special Zones Authorities (ECZA) has developed 6 new projects valued at 522 million SAR in King Abdullah Economic City (KAEC) by allocating lands and providing logistics geared towards empowering small and medium enterprises (SMEs).



280
million SAR

The value of investments attracted by King Salman Energy Park, aimed at enhancing supply chains across the industry and energy sectors.



Signing **4** Contracts for Maritime Services Provision

The Saudi Ports Authority (Mawani) has signed 4 contracts with Zamil Marine Services and Naghi Marine Co. for the provision of maritime services in 8 ports through private sector investments exceeding 1 billion SAR.



PIF and Hyundai Motor Company Agreement

The Public Investment Fund (PIF) and Hyundai Motor Company (Hyundai) signed a joint venture agreement to establish a highly automated vehicle manufacturing plant in the Kingdom. With estimated investments of over 1 billion SAR, the joint venture aims to manufacture 50,000 vehicles per year.



Holding the Saudi-Swiss Seminar in Riyadh (The Power of Now)

The event was attended by His Excellency Eng. Saleh bin Nasser Al-Jasser, the Minister of Transport and Logistics Services, Vice Chairman of NIDL Committee; His Excellency Eng. Khalid bin Saleh al-Mudaifer, Deputy Minister of Industry and Mineral Resources for Mining Affairs; Helene Budliger Artieda, the Swiss State Secretary for Economic Affairs; and Eng. Suliman Almazroua, CEO of the National Industrial Development and Logistics Program (NIDL).

in addition to

several government officials

and representatives of over

140 Saudi and Swiss companies

The seminar's objectives included:

Highlighting the economic transformation taking place in Saudi Arabia and exploring emerging investment opportunities between the two countries.

Forging ahead in developing new capabilities and promising market opportunities for the two countries, ultimately facilitating international trade and economic growth.

Fostering bilateral communication and establishing partnerships based on mutual economic values and interests.

The seminar examined the positive impacts of Vision 2030, aimed at positioning the Kingdom as a leading industrial powerhouse and a global logistics hub.



Holding the Saudi-French Conference in Riyadh Under the Title “France 2030 and Vision 2030 Towards Industrial Transformation”

The conference was attended by His Excellency Bandar bin Ibrahim Alkhorayef, the Minister of Industry and Mineral Resources, and His Excellency Ludovic Pouille, the French Ambassador to the Kingdom of Saudi Arabia.

The conference featured

40+

French companies

+16

Government entities from both sides

+90

Saudi global companies in the energy, industry, and fourth industrial revolution sectors.

Supported by NIDL and Business France, the conference aimed to spur industrial progress and provide a networking platform that brought together global investors and business owners, ultimately supporting the transformation of the Kingdom into a leading center for clean energy and industry.

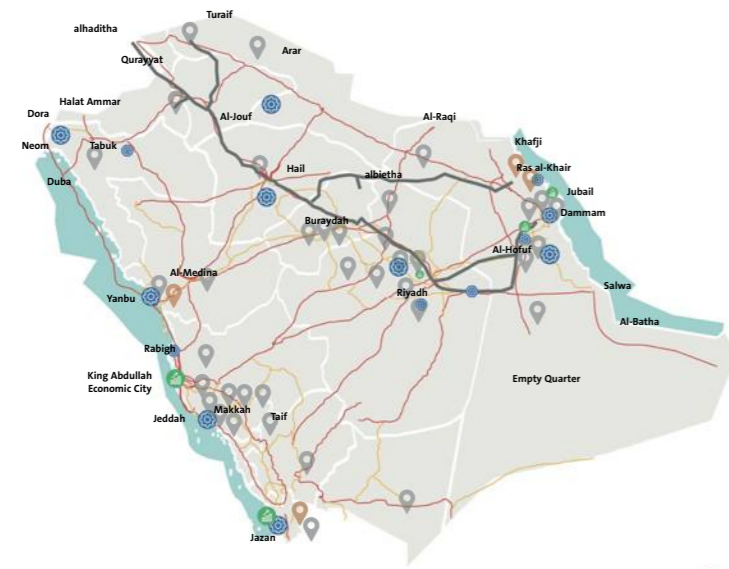


Infrastructure Development and Process Optimization



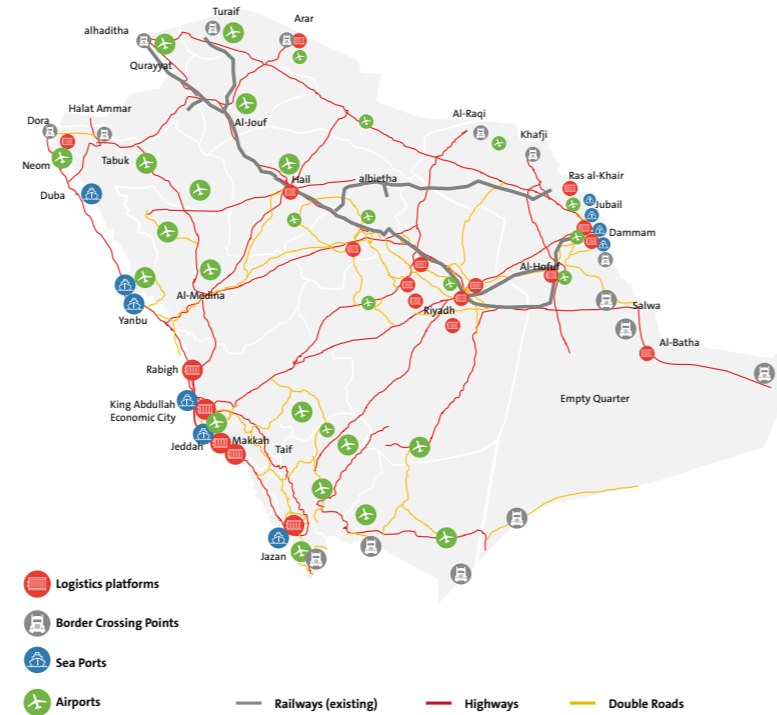
Facts and Figures

Reach to **59** industrial cities



- Economic cities
- Industrial cities
- Marine industries
- Industrial cities (Saudi Authority for Industrial Cities and Technology Zones "MODON")
- Industrial cities (The Royal Commission for Jubail and Yanbu)

Reach to **22** logistics centers



- Logistics platforms
- Border Crossing Points
- Sea Ports
- Airports
- Railways (existing)
- Highways
- Double Roads



Total industrial facilities

11,549

60%
growth rate

7,206

Total number of ready-built factories

1,339

174%
growth rate

489

Special economic zones

5

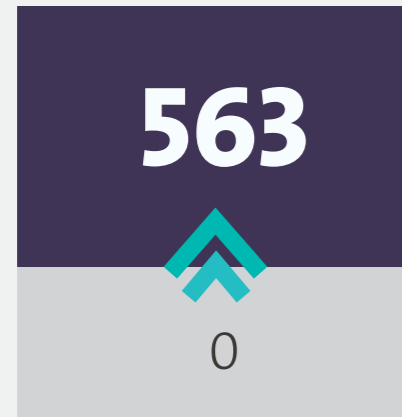
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December 2023

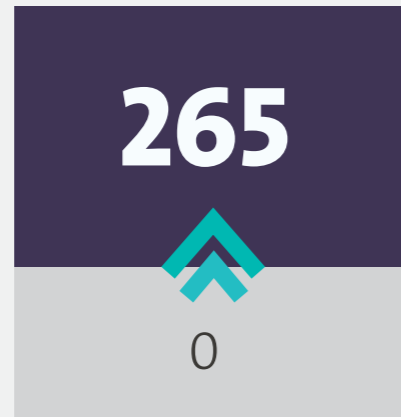
2016

Facts and Figures

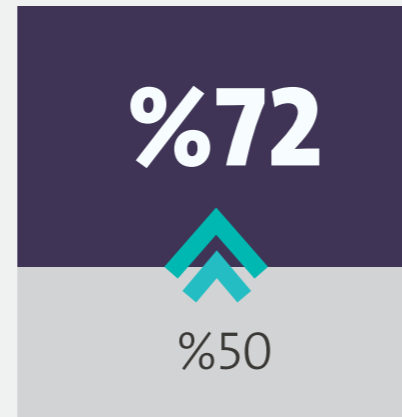
Number of logistics licenses



Number of licensed companies in the military industries sector



Port utilization rate



December 2023 2016

Integrated Logistics Zones



Finalizing the necessary studies to establish integrated logistics zones at King Abdulaziz International Airport in Jeddah and King Fahd International Airport in Dammam, with the aim of increasing air cargo capacity to 4.5 million tons.



Launching a logistics e-platform

For the Integrated Logistics Special Zone in Riyadh, where the platform supports upgrading infrastructure, improving systems and processes, and serving investors and entrepreneurs.



Launching the first innovation-fostering program

The Pilot Regulatory Environment initiative was launched as the first innovation-fostering program, with the aim of testing and exploring new transport models and aligning them with existing regulations.



Laying the foundations for Maersk's integrated logistics park

The Saudi Ports Authority (Mawani) has realized various achievements, most notably: Laying the foundations for Maersk's largest Integrated Logistics Park in the Middle East, setting up an integrated bunker station to boost logistics infrastructure, and signing an agreement to establish an integrated logistics zone in the Al-Khumra area.

1,339 Ready-made Factories From MODON



MODON continued its endeavor to provide high-quality services in support of entrepreneurs and SME owners, completing a total of 1,339 ready-made factories by the end of 2023.





Opening an Additional Terminal at Prince Naif Bin Abdulaziz Airport

His Royal Highness Prince Dr. Faisal bin Mishaal bin Saud bin Abdulaziz, Prince of Al Qassim Province, inaugurated an additional terminal at Prince Naif bin Abdulaziz International Airport. The ceremony was attended by His Excellency Saleh bin Nasser Al Jasser, Minister of Transport and Logistics Services; His Excellency Mr. Abdulaziz bin Abdullah Al-Duailej, President of the General Authority of Civil Aviation; Eng. Mohammed Abdullah Al Maghlouth, CEO of MATARAT Holding, and Eng. Ali Masrahi, Cluster 2 Company CEO.



Laying the Foundations for an Integrated Logistics Area in Jeddah Islamic Port

With a total area spanning over 130,000 square meters. The area's investment value aggregates to approximately 487 million SAR over the project's lifetime. Mawani also signed a contract with Saudi Logistics Services "SAL" to establish a logistics park at Jeddah Islamic Port, with a total area of 54,000 square meters, to enhance sea and air connectivity; which will contribute in improving the logistics services provided, aiming to raise the Kingdom's ranking in international indicators.





Laying the Foundations for an Integrated Logistics Park at Dammam's King Abdulaziz Port

Mawani and MELDOG, the logistics arm of the Mediterranean Shipping Company "MSC", laid the foundations for an integrated Logistics Park at Dammam's King Abdulaziz Port, with an investment value exceeding 150 million SAR. The agreement is intended to develop infrastructure to draw investments and position the Kingdom as a global logistics hub.



Two Agreements to Establish Logistics Zones in Dammam and Jeddah

Two agreements were signed to establish logistics zones at King Abdulaziz Port in Dammam, with an area of 32,000 square meters, at an estimated value of 35 million SAR. The second zone is located in Al Khumra, south of Jeddah, with an investment value of approximately 1 billion SAR and a total area of 3 million square meters, aimed at increasing the Kingdom's resources by attracting more investment opportunities.



Launching the Largest Bus Transport Project

The Transport General Authority (TGA) launched the Kingdom's largest bus transport services project. Operating through three international alliances, the project aims to establish connections throughout 76 routes across the Kingdom, creating over 35,000 direct and indirect job opportunities. The project has the capacity to accommodate 6 million passengers annually with a fleet of 380 buses.



Launching the Geoscience Data Analytics Center

Forming an international committee to create and manage the Geoscience Data Analytics Center, effectively contributing to advancing modern technology across various geoscience fields and facilitating investors' access to geological data.





Launching the Kingdom's First Electric Transport Truck

The Transport General Authority (TGA) issued the first license to Saudi Post's subsidiary, NAQEL, for the first electric transport truck in the Kingdom. This is aimed at preserving the environment, supporting the Saudi Green Initiative, and enhancing the efficiency of services in the logistics sector.



Issuing the First Trial Operating License for Hydrogen Train in Saudi Arabia



129 million SAR agreements to develop public facilities

A 129 million SAR commercial agreement was signed with several companies to develop a number of public and commercial facilities in Jazan City for Basic and Transformational Industries.

572,835 meters of fiber optic coverage

Fiber optic installations were completed in all industrial and commercial areas and public parks in Yanbu Industrial City, reaching 572,835 meters by the end of 2023.



MODON Received the MEED Projects Awards 2023

for Economic Impact, recognizing its project to design and develop infrastructure facilities for the industrial and commercial zones in MODON Oasis in Jeddah.



Winning the Advanced Port Infrastructure Award and 3 More Awards in Digital Transformation

The Saudi Ports Authority (Mawani), represented by the Jeddah Islamic Port, has won the Advanced Port Infrastructure Award in recognition of its efforts to develop the Kingdom's logistics infrastructure, aimed at attracting investments and enhancing access to global markets. Mawani also won 3 international awards, namely: The Digital Transformation Award, Port of the Year 2022 award, and Excellence in Corporate Branding award.





Riyadh Integrated

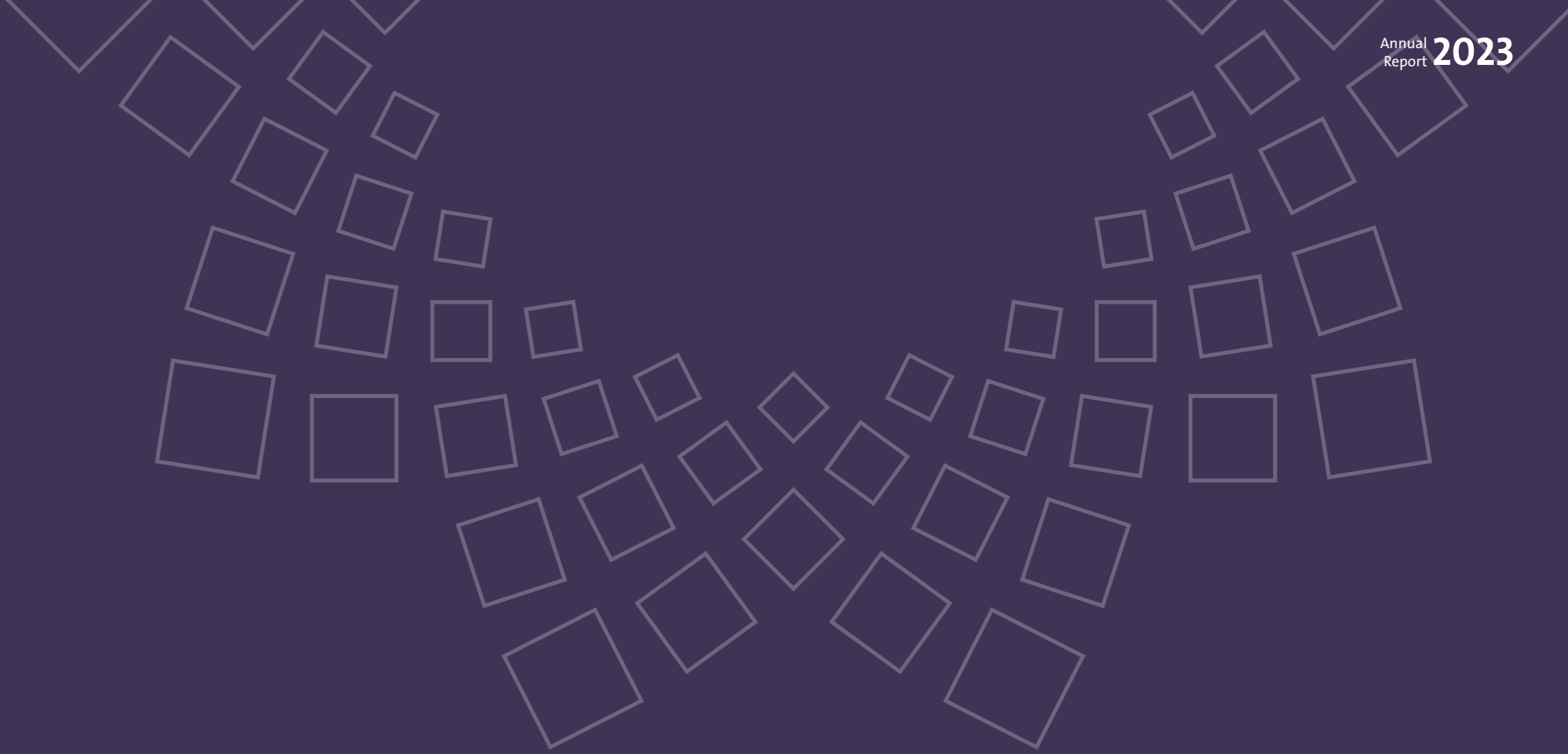
The integrated logistics special zone at King Khalid International Airport in Riyadh was registered under the trademark (Riyadh Integrated), with a number of investment licenses granted to investors within the zone and MoUs signed with major investment companies in several target sectors.



Flynas Joined the United Nations World Tourism Organisation (UNWTO)

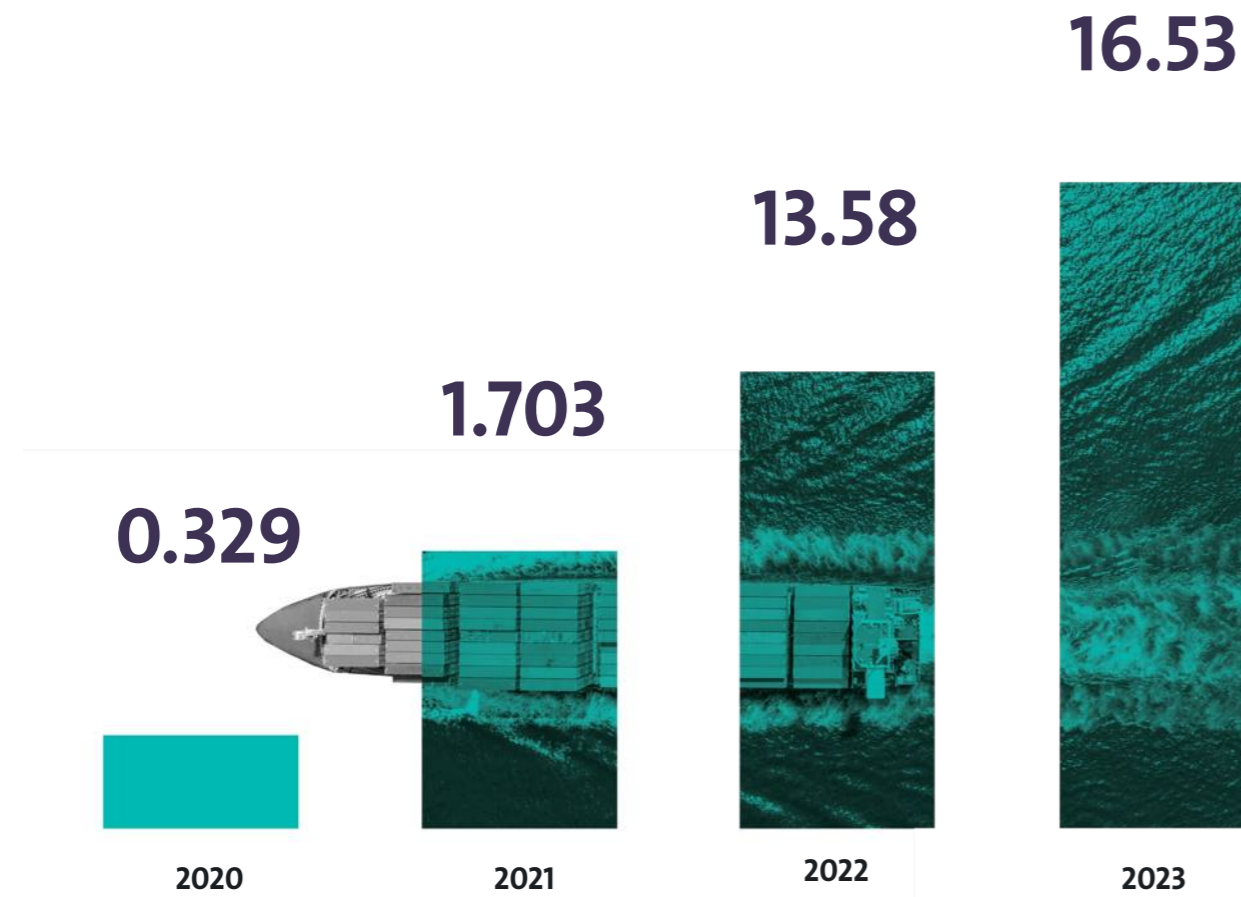
Flynas has joined the United Nations World Tourism Organization (UNWTO) as an affiliate member, becoming the first Saudi airline and first low-cost carrier in the Middle East to join the organization.

Improving Regulations and Legislation



Facts and Figures

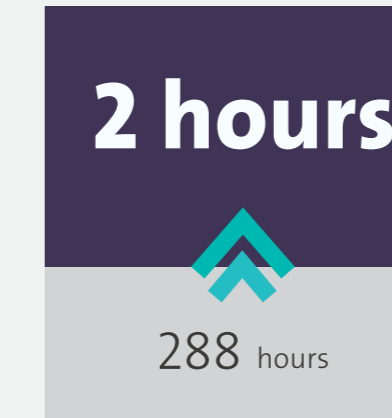
Cumulative Total Credit Facilities Utilized by Saudi EXIM Bank (billion SAR)



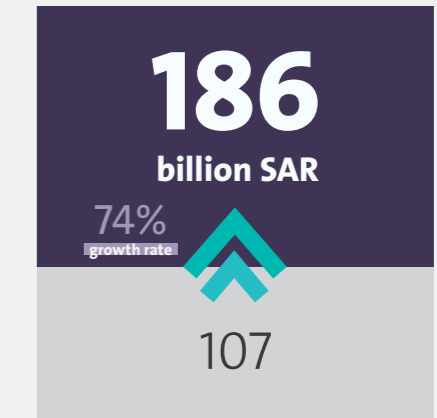
Value of local content in non-oil sectors



Customs clearance time



Saudi industrial development Fund (SIDF) net loan credits



December 2023 2016



Operational Excellence at the Kingdom's Airports

The regulatory framework required to monitor operations at the Kingdom's airports was developed in order to achieve operational excellence by maximizing the operational effectiveness of all operating entities.

Adopting and Publishing the General Policy, Saudi Post System, and the Executive Regulations

To regulate and develop the sector as well as its level of growth, ultimately contributing to achieving the objectives of Vision 2030.

Activating the Logistics Platform at King Abdullah Economic City (KAEC)

Launching the first phase designated for the automotive manufacturing sector and covering an area of nearly 5 million square meters and signing 3 investment contracts with a number of companies.

Approving the Rental Rate's Structure

This is for air cargo terminals at airports and aimed at enhancing competitiveness and attracting investments.

Studying Quality- Required Infrastructure Services



هيئة المحتوى المحلي
والمشتريات الحكومية
Local Content & Government
Procurement Authority

The current situation is assessed, along with identifying the current and future needs of the Saudi market for quality infrastructure services in various regions of the Kingdom, setting development plans and a roadmap to meet the market need for such services, and enhancing MODON's role in supporting the national industry and local manufacturers.



Launching the Validity Certificate

which helps verify qualified SMEs through the Jadeer service, digitally linked to major government agencies.

Approving the Jadeer Supplier Certificate

as a requirement for SME supplier registration adopted by several reputable companies (most notably, Aramco and SABIC).

40+

partners in Jadeer

Signing agreements to onboard over 10 partners to Jadeer service (including: Bank Albilad, Etihad Etisalat Company, Ma'aden, Sadara Chemical Company, Saudi Arabian Military Industries "SAMI" and Safa Investment Company), bringing the total number of Jadeer partners to over 40 by the end of 2023.



Approving Red Sea International Airport Fees

which contributes to empowering the airport and increasing its competitiveness among other tourism-related airports across the region, while providing exemptions from seaplane fees to incentivize companies to operate in the Kingdom.



وزارة النقل والخدمات اللوجستية
Ministry of Transport and Logistic Services

Adopting the Road Sector Strategy

which aims to ensure traffic safety, improve the quality of infrastructure, reduce accident rates, develop the road sector in general, and work on the necessary modernization of regulations.

هيئة الزكاة والضريبة والجمارك
Zakat, Tax and Customs Authority

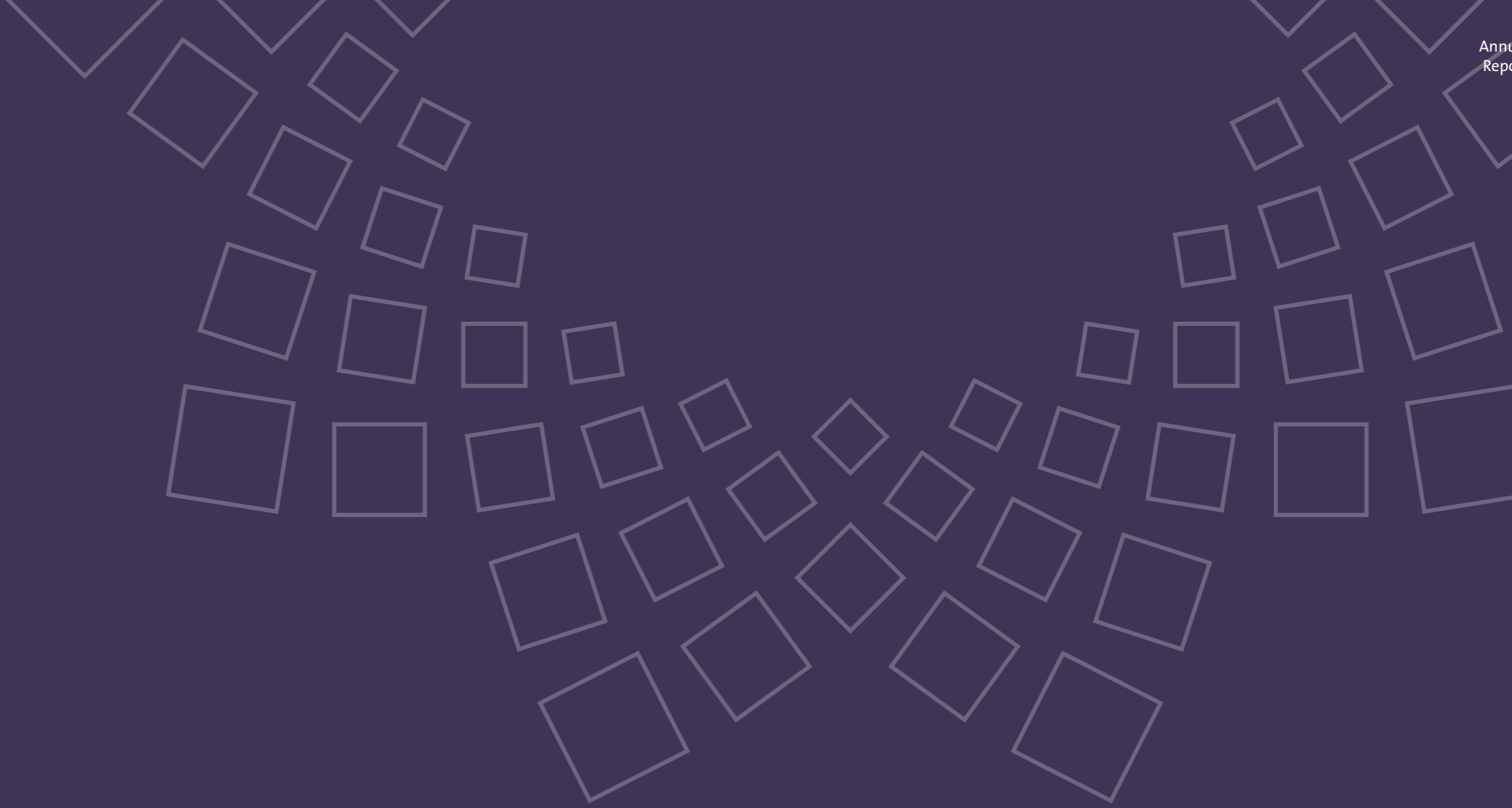


Automating customs clearance permits and introducing the “Clearance within Two Hours” initiative

Automating customs clearance permits for items restricted by government entities by 92%, i.e. 24 out of 26 entities, with an aim to increasing the flexibility of logistics services, speeding up the customs clearance process, and improving the customer experience.

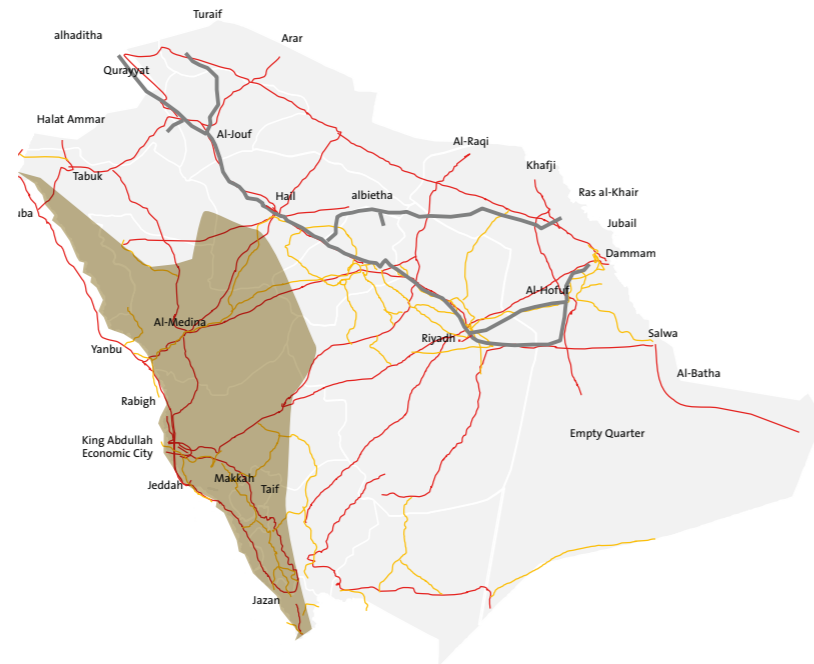


Resource Optimization



Facts and Figures

\$2.5 Trillion
Value of the Kingdom's Mineral Resources



- Arabian Shield
- Dual Carriageway
- Highways
- Railways (existing)



Total renewable energy capacity connected to the grid

2.8
GW



0

Gas processing capacity

19.3
billion cubic feet per day

21%
growth rate



15.95

Number of valid mining licenses

2,355

19%
growth rate

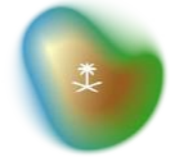


1,985

December 2023 | 2016



وزارة الطاقة
MINISTRY OF ENERGY



6 solar energy projects with 6.2 GW capacity

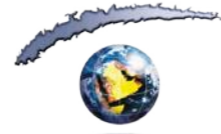
Energy purchase agreements were signed for 6 renewable energy projects with a total capacity of 6.2 GW, aiming to increase the proportion of renewable energy and optimize the energy mix.

Completion of the final commissioning of the Jeddah, Rabigh, and Sudair solar power plants

with a total capacity of 2.1 GW, aiming to increase the proportion of renewable energy and optimize the energy mix.

Reducing CO₂ emissions by 1,046 tons

Reducing the average movement of yard cranes per incoming container required for manual inspection, along with the turnover rate of trucks within the Jeddah Islamic Port, in order to cut carbon dioxide emissions by as much as 1,046 tons by the end of 2023. This is in line with the Kingdom's initiatives to preserve the environment and establish a prosperous and sustainable maritime sector.



Establishing a “Mining Fund” and Geothermal Energy Exploration and Assessment Initiative Project

Establishing a mining finance fund to ensure the growth of the sector, increase its economic and financial contribution, and find solutions to its challenges. The fund is the first mining development fund of its kind in the Middle East.

Through the Geothermal Energy Exploration and Assessment Initiative, the Saudi Geological Survey (SGS) has utilized geological information, conducted field measurements and experiments related to various geological sciences, completed exploratory drilling to a depth of 1000 meters north of Harrat Rahat and 800 meters in the granite area, and discovered a promising geothermal reservoir in the Medina region.

30%
of the Arabian Shield area





Developing human capital in the atomic and renewable energy sectors

Developing a human capacity strategy for the atomic and renewable energy sectors, along with launching and implementing the first set of national talent qualification programs.



الهيئة العامة للصناعات العسكرية
General Authority for Military Industries

400 trainees in military industries

Programs targeting over 400 trainees (including: Air, Land, and Maritime Defense Capability Management and Defense Portfolio, Programs, and Projects Management).



Promoting the proficiency of 755 trainees in export and international trade

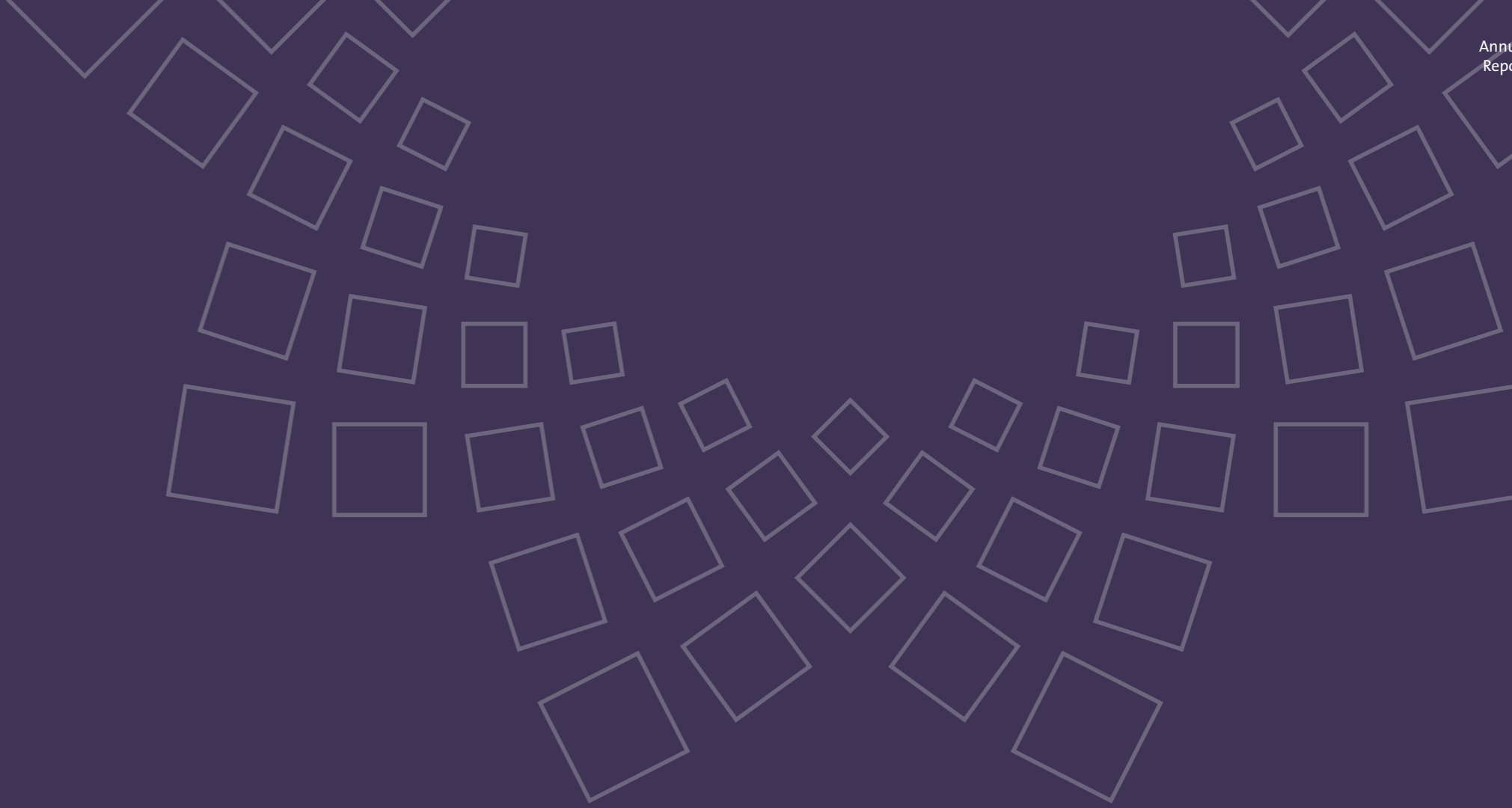
The Saudi Export Development Authority (Saudi Export) offered a series of workshops and training programs in aspects related to international trade, with a total of 356 training hours, benefiting 755 male and female trainees representing over 400 companies.



15 free scholarships

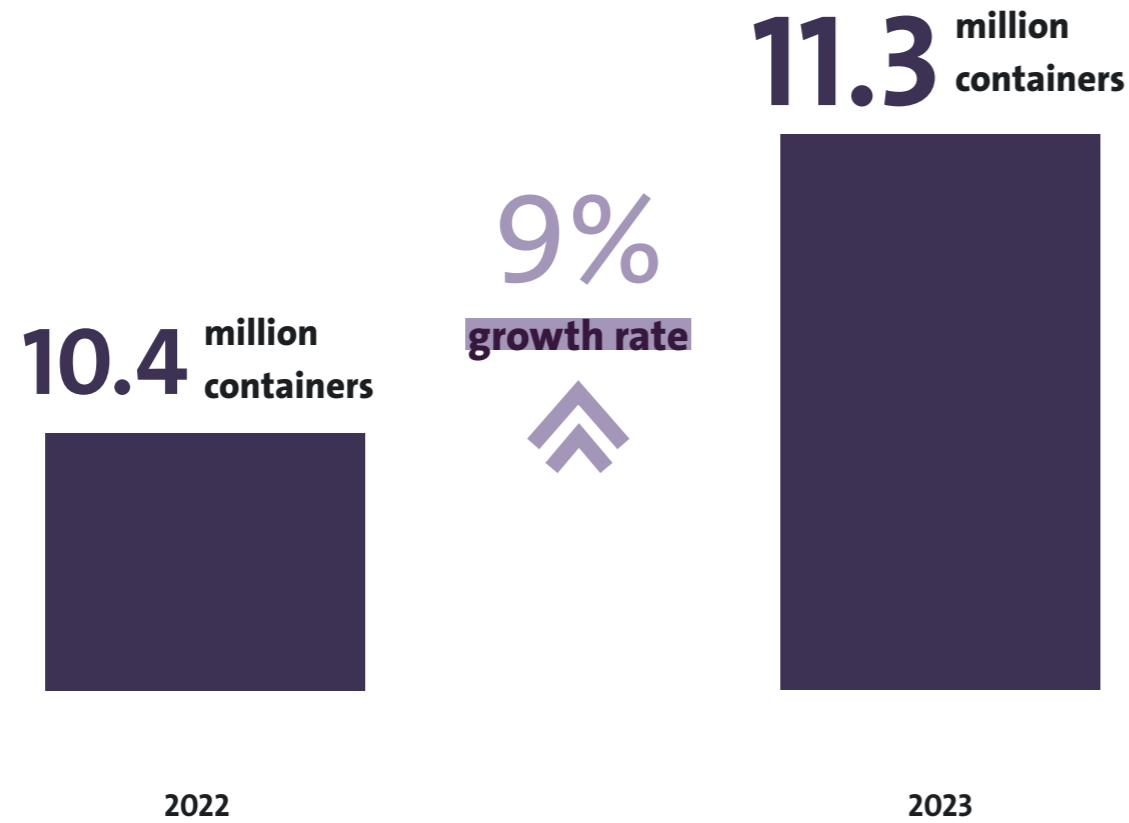
Providing 15 free scholarships in partnership with the Singapore Supply Chain and Logistics Academy (SCALA), the first program dedicated to qualifying and developing future female leaders in the logistics sector.

Market Access

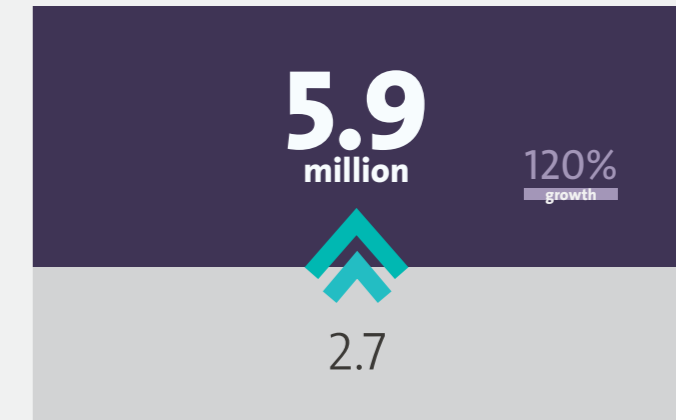


Facts and Figures

Number of Containers Handled



Number of Transshipment Containers



December 2023 | 2016

SAUDI EXIM
بنك التصدير والاستيراد السعودي

15.26
billion SAR of facilities

The total granted facilities accredited by the Saudi EXIM Bank by the end of the third quarter of 2023 reached 15.26 billion SAR.



GACA®
الهيئة العامة للطيران المدني
General Authority of Civil Aviation

Ranked **13th**
globally at IATA

The Kingdom advanced 14 ranks at the Global Air Connectivity Index issued by the International Air Transport Association (IATA), becoming the 13th globally.

SAR

الخطوط الحديدية السعودية
SAUDI ARABIA RAILWAYS

Launching the export service from the Riyadh Dry Port

achieved via railways, aiming to provide effective and green transportation solutions that contribute to empowering national industries in accordance with the objectives of the National Strategy for Transport and Logistic Services.

المصادر السعودية
هيئة تنمية الصادرات السعودية



Addressing Airport Barriers

Identifying, addressing, and overcoming the obstacles and challenges facing export services to ensure the products reach the targeted markets. Accordingly, 69% of these were addressed across various sectors.

موانئ
MAWANI
الهيئة العامة للموانئ
SAUDI PORTS AUTHORITY

25

New Shipping Services

with major international shipping routes as of early 2023.

The First Logistic Connectivity Attempt

The Saudi Ports Authority, along with the General Authority of Civil Aviation (GACA) and the Zakat, Tax and Customs Authority (ZATCA), have started activating the memorandum of understanding previously signed between the two. The two parties will cooperate in achieving logistic connectivity between seaports and airports during 2023, ensuring facilitated transit of sea shipments and connecting them to airports.

Operating flights to Red Sea International Airport

Saudi Airlines and Red Sea International Company celebrated the first direct flights departing from and to Red Sea International Airport. The national carrier's flights were scheduled to Red Sea International Airport, one of the future destinations of Vision 2030 in its first phase, with two flights per week in both directions.



Exporting and licensing 4 local companies and signing 7 agreements

The Export Houses licensing service was inaugurated, which allows the investors to apply for an export house license from the Saudi Export Development Authority. Four local companies were licensed to practice the export house activity, signing agreements with a number of government entities.



المصادر السعودية
هيئة تنمية المصادر السعودية

TGA
الهيئة العامة للنقل
Transport General Authority

GACA
الهيئة العامة للطيران المدني
General Authority of Civil Aviation

3,365+ products for Made in Saudi

By the end of 2023, the total number of companies registered in The Made in Saudi program exceeded 490 companies, while the total number of registered products aggregated to over 3,365 products.

Launching a Saudi technology brand

The Made in Saudi program inaugurated a Saudi technology label to promote local technology companies and products and enhance their position at domestic and international levels.

The Kingdom wins membership in the International Maritime Organization (IMO) Council for the 2024-2025 biennium.

This follows the Kingdom's receiving of 143 votes from the organization's member states during the elections held in London.

Inaugurating the Regional Safety Oversight Organization

HE General Authority of Civil Aviation (GACA) President inaugurated the Regional Safety Oversight Organization for the Middle East and North Africa regions (MENA RSOO).



Ranked **16th** globally in
 the Liner Shipping Connectivity
 Index (LSCI)

The Kingdom jumped to the 16th place globally in Liner Shipping Connectivity Index (LSCI), enhancing its international competitiveness by scoring 79.01 points, according to UNCTAD's report for the fourth quarter.

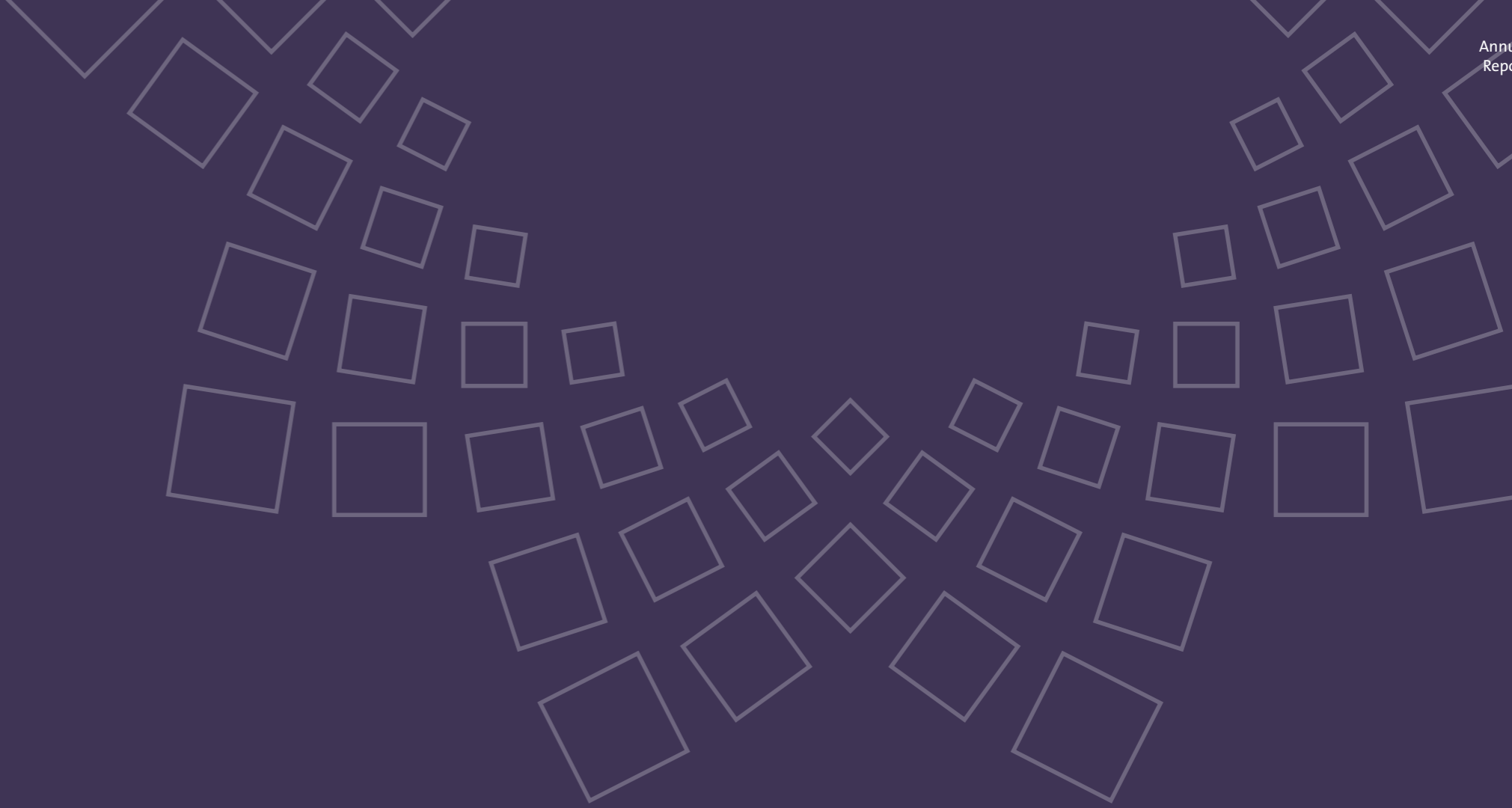


Launching the

**(Made in Makkah) and
 (Made in Madinah) labels.**

This consolidates the Kingdom's position and enhances its exports' competitiveness and reliability in the global market.

Incentive Initiatives



1K MILE

Mining Industry Logistic Energy

ENTREPRENEURSHIP ريادة الأعمال

1K Mile Initiative



1K MILE Initiative

The first edition of the “1K MILE” program encouraged entrepreneurship in the industrial and logistics sectors by providing the necessary support for entrepreneurs, enabling them to benefit from the great transformation brought about by Vision 2030. The program’s packages included:

- Developing feasibility studies
- Assisting in meeting financing agencies’ requirements
- Providing high quality consultations
- Supporting project marketing and providing investment opportunities
- Dedicated incentives for the best projects

Over 1,400 entrepreneurs applied for the first edition of the program, of whom over 200 applicants were selected for the training program. Afterwards, 40 entrepreneurs were nominated were nominated to develop initial feasibility studies for their projects, and the program worked with them on preparing economic feasibility studies until their graduation.

These projects are expected to help create over 1,000 jobs and attract investments of over 200 million SAR.

The initiative was implemented in partnership with over 20 entities from the government and private sectors.

Supporting entities 23



The Second Edition of the “1K MILE” Initiative Was Launched at the Entrepreneurs Bootcamp.

In presence of

350+
Entrepreneurs

Hosted

25+
panel discussions and
learning sessions with
experts and advisors



The bootcamp activities included



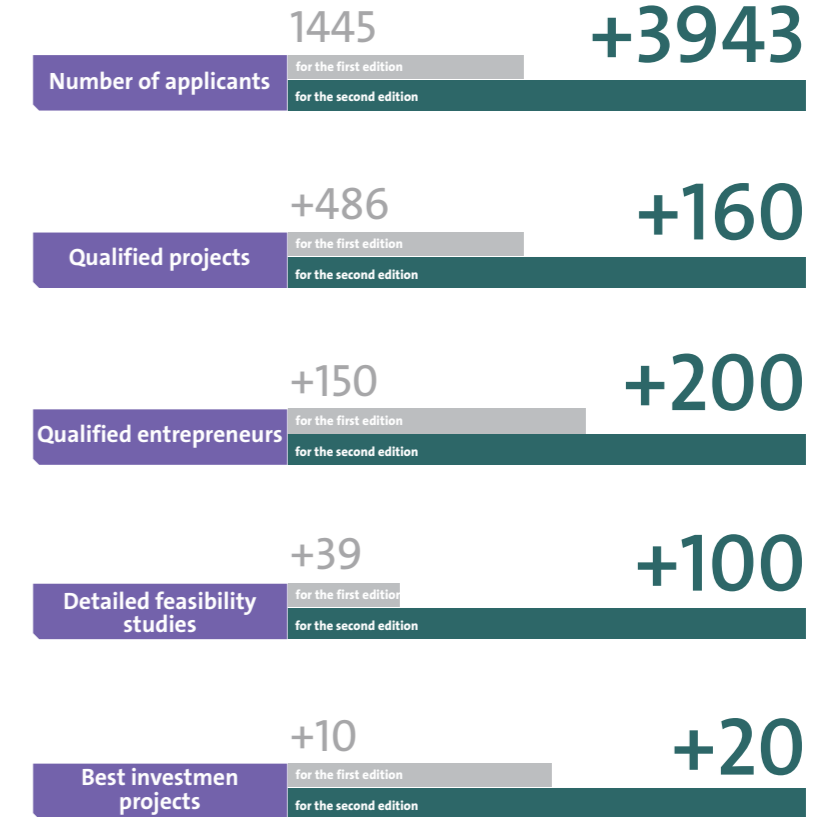
Guidance and counseling sessions



Reviewing success stories and inspiring experiences



Workshops with experts and experienced guests in the industrial and logistics sectors





داليل DALEEL Platform

Daleel Platform

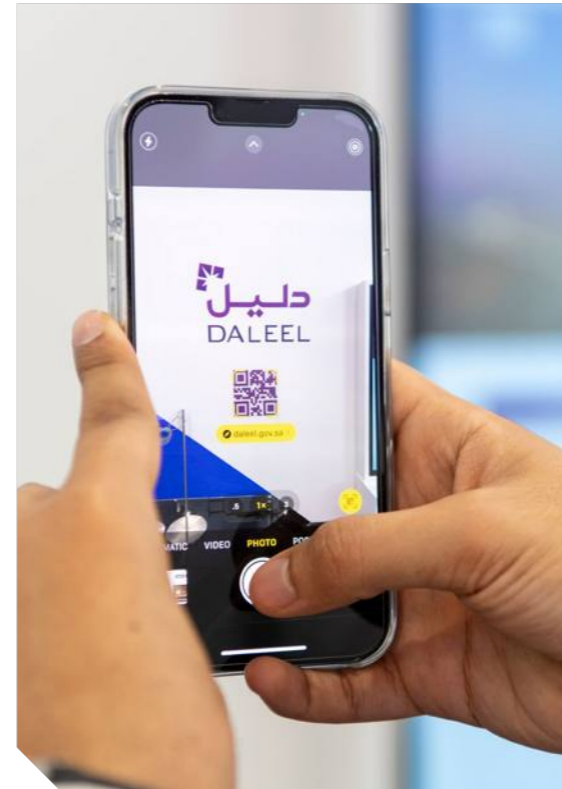
As part of the endeavors to enhance communication with the private sector, the National Industrial Development and Logistics Program, in cooperation with its executing entities and success partners, continued to improve the Daleel platform, which provides all the information the beneficiary needs in the program's sectors. It offers a comprehensive view of the competitive advantages of the main and sub-sectors, the enablers and support packages, and the Investor Journey that outlines the requirements for each step, along with the costs and expected completion duration. The offered enablers and support packages include: General and Special Enablers.

- General Enablers include: Financial Enablement through multiple programs (such as AFAQ Program, which supports small and medium industrial projects); Human Capital support (such as Momaken and Tamheer programs, the Employment Support Program); Industrial Cities and Special Economic Zones (such as Saudi Authority for Industrial Cities and Technology Zones, the Royal

Commission for Jubail and Yanbu, and Economic Cities and Special Zones Authority); in addition to enhancing local content through various programmes, policies, and mechanisms.

- While Special Enablers include: SMEs Enabling through productivity improvement programs, export incentives, and technology localization.

Daleel platform also provides preliminary market insight data that supports the beneficiaries of all the program's sub-sectors in developing feasibility studies. An interactive map of the industrial cities in the Kingdom is also available, displaying the most prominent data related to infrastructure and relevant services, as well as the achieved progress of the projects developed in this regard.



Human Leadership for a Sustainable Future



Launching the “1K MILE” Initiative by the National Industrial Development and Logistics Program was a major shift. It offered unparalleled opportunities for young Saudis to embark on the world of entrepreneurship in the industrial and logistics sectors, offering them the necessary enablers to achieve their dreams and overcome any obstacles.

Daleel: A Map That Guides



Two minutes that sum up the entire investor’s journey, outlining the entities’ procedures and requirements, along with feasibility studies enriched with market insight and comparisons across domestic and global markets for the targeted activity. Welcome to Daleel platform!

The National Industrial Development and Logistics Program

celebrates its 2023 achievements and recognizes outstanding entities

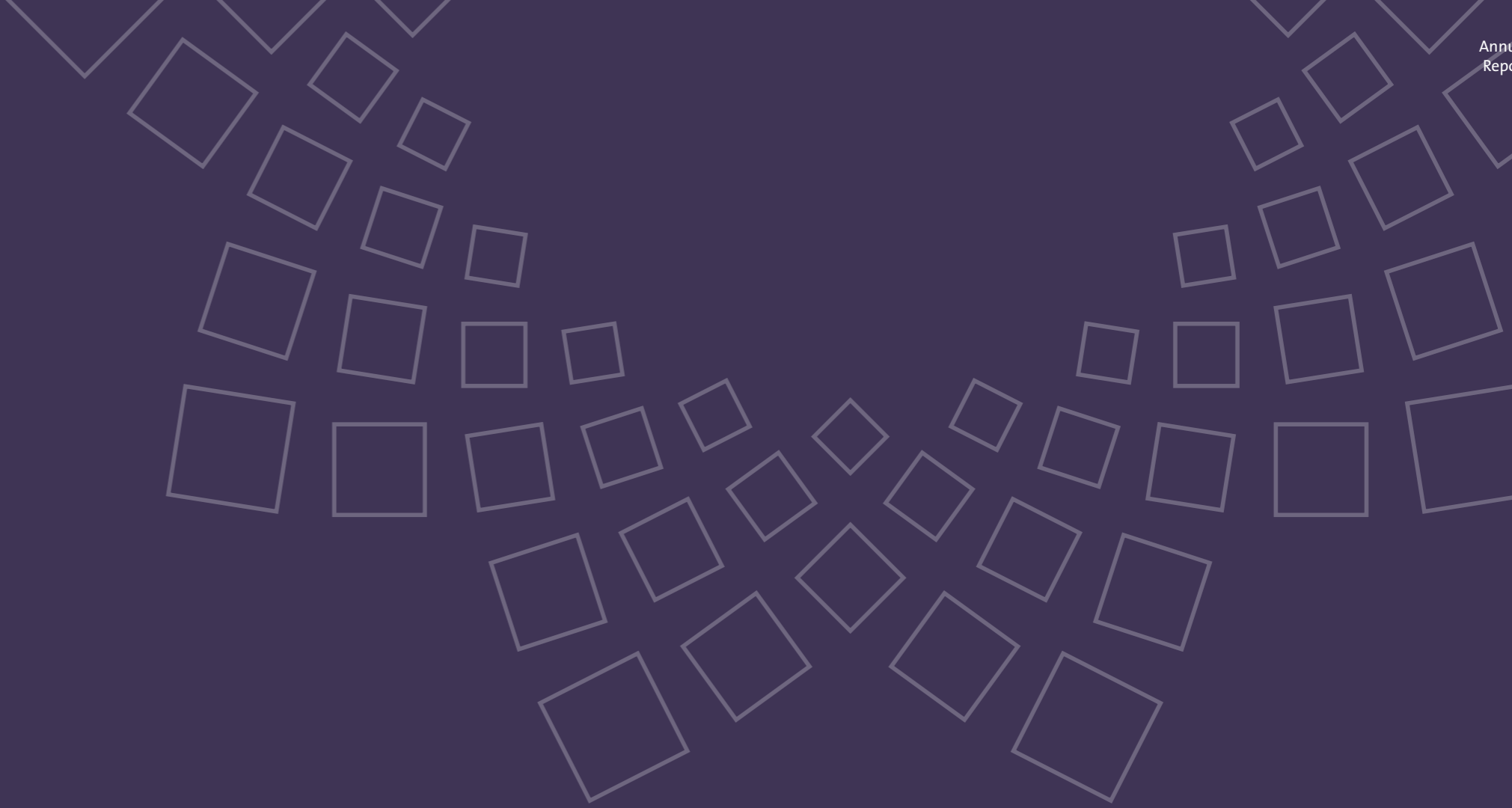
In its annual ceremony for 2023, the National Industrial Development and Logistics Program (NIDLP) honored the outstanding entities with the “NIDLP Excellence Award”, encompassing several categories. The ceremony was organized in the presence of His Excellency Mr. Bandar bin Ibrahim Alkhorayef, Minister of Industry and Mineral Resources, Chairman of NIDLP Committee; His Excellency Engineer Saleh bin Nasser Al-Jasser, Minister of Transport and Logistics Services, Vice Chairman of NIDLP Committee, along with members of NIDLP Committee, sector leaders, officials and representatives from government entities, and private sector companies and institutions.



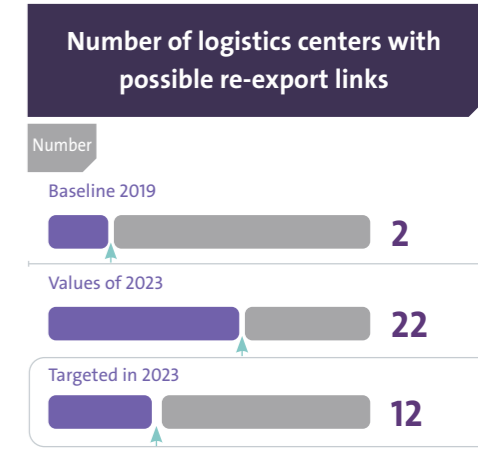
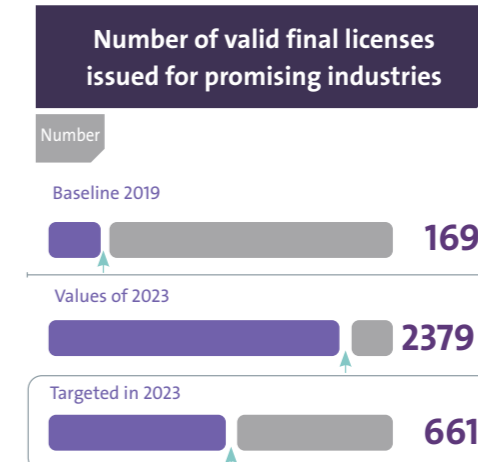
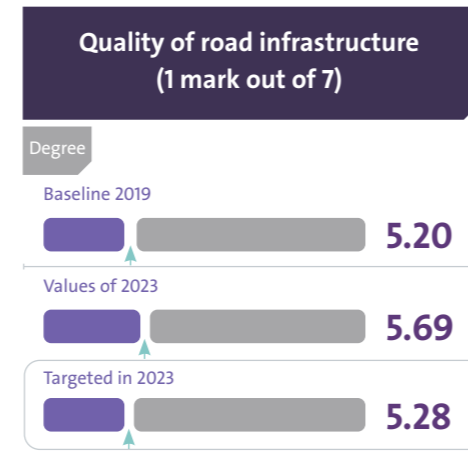
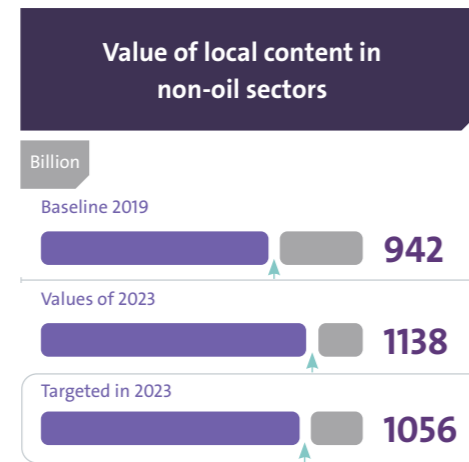
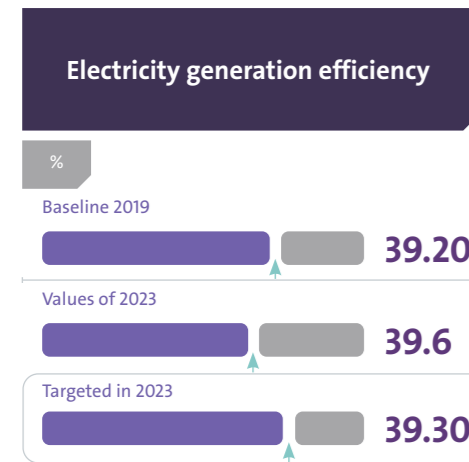
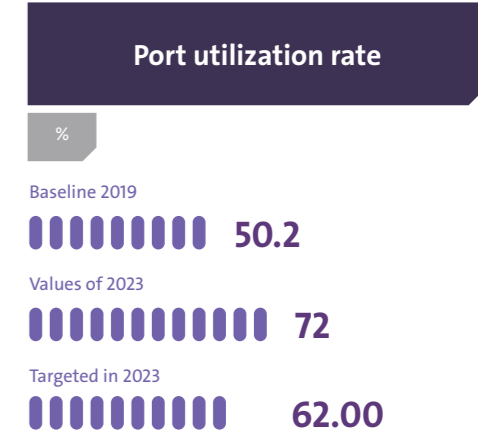
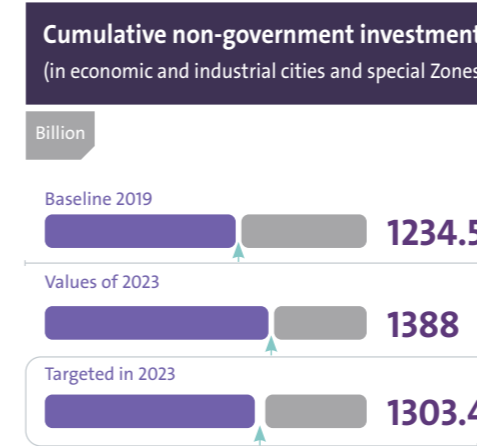
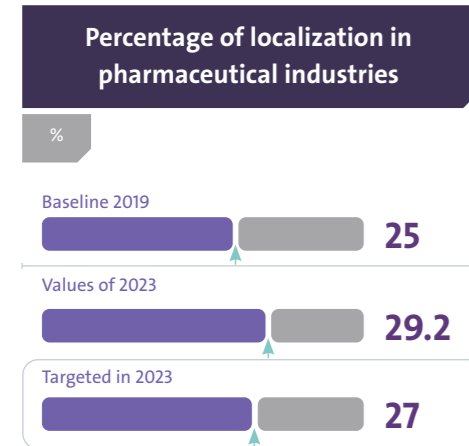
NIDLP Excellence Award



Key Performance Indicators (KPIs)



Main Indicators



قصة إنجاز لا تنتهي..

The impact in 2023



Scan to watch



نتكامل لصناعة المستقبل
Integrating Towards a Prosperous Future

- 
Energy Sector
- 
Mining Sector
- 
Industry Sector
- 
Logistics Sector
- 
Fourth Industrial Revolution
- 
The Local Content



Integrating Towards a Prosperous Future



Energy
Sector



Mining
Sector



Industry
Sector



Logistics
Sector



Fourth Industrial
Revolution



The Local
Content