

# Saudi Arabia - Transport and Logistics: Vision 2030 to drive growth (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

Saudi Arabia's roads and railways provide efficient and affordable transportation. Facilities to neighboring countries have proved beneficial. The country has 100,000 miles of paved roads, the most famous of which is the King Fahd Causeway that links Saudi Arabia to Bahrain. Foreign direct investment (FDI) recorded a CAGR of 11.6%, from US\$12.2bn in 2012 to US\$7.5bn in 2016. The decline was primarily due to a fall in oil prices. Geopolitical tensions in the region may also account for the decrease. The industries that attract the most FDI are oil, gas, chemicals, real estate, hotels and tourism.

MarketLine's Premium industry reports provide a comprehensive overview of the market and include sections on: risk and reward, key industry trends and drivers, SWOT analysis, competitive landscape, innovation, deals, key developments, and industry benchmarking to compare key performance indicators with regional and global markets.

### Key highlights

Government initiatives to drive road transportation GVA

Road transport GVA in Saudi Arabia recorded a CAGR of 8.1%, from US\$14.2bn in 2012 to US\$20.9bn in 2017. It is anticipated to post a CAGR of 5.3%, from US\$22.1bn

in 2018 to US\$27.3bn in 2022, driven by the government's focus on road modernization and construction projects. The transportation ministry is planning to develop 49,000kms of road and will invest US\$100.0bn in transport and logistics projects by 2025.

#### Increasing passengers to drive air transport GVA

Air transport GVA in Saudi Arabia recorded a CAGR of 5.5%, from US\$9.3bn in 2012 to US\$12.2bn in 2017. GVA is anticipated to post a CAGR of 5.0%, from US\$12.9bn in 2018 to US\$15.7bn in 2022. The increase will primarily be due to the expansion of air passenger volumes.

#### Growth in new container ports to drive capacity

Port container storage capacity in Saudi Arabia recorded a CAGR of 4.4%, rising from 6.6 million TEUs in 2012 to 8.2 million TEUs in 2017. It is anticipated to post a CAGR of 5.0%, from 9.0 million TEUs in 2018 to 10.4 million TEUs in 2022, due to a growing preference for water transportation for the movement of goods and services.

## SCOPE

**Risk & Reward Index:** The Risk & Reward index compares the position of Saudi Arabia's transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

**Industry Snapshot and Industry View:** Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and export gross value added, FDI and trends driving market performance.

**Industry SWOT Analysis:** Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in Saudi Arabia's transport and logistics market.

**Industry Benchmarking:** Benchmark how Saudi Arabia's transport and logistics market is performing compared to regional and global markets in terms of GVA, fleet size and freight traffic by mode.

**Competitive Landscape:** Overview of industry players compared with their peers across a set of indicators.

## REASONS TO BUY

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the Saudi Arabia transport and logistics industry compared to other countries in Middle East and Africa?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the Saudi Arabia transport and logistics industry and their presence in respective segment?

What trends are being witnessed within the Saudi Arabia transport and logistics industry?

What are the Saudi Arabia transport and logistics industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Saudi Arabia transport and logistics industry?

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