

Saudi Arabia Automotive Repair and Maintenance Services Market By Service Type (Repair and Maintenance), By Vehicle Type (Two-Wheeler, Passenger Car, LCV, and M&HCV), By Service Provider (Automobile Manufacturers, Franchise General Repairs, Locally Owned Repair Shops), By Region, Competition, Forecast & Opportunities, 2019-2029F

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Abstracts

Saudi Arabia Automotive Repair and Maintenance Services Market was valued at USD 1.51 Billion in 2023 and is expected to reach USD 2.31 Billion by 2029 with a CAGR of 7.28% during the forecast period.

The Saudi Arabia Automotive Repair and Maintenance Services Market forms a crucial component of the nation's automotive industry, offering a spectrum of services that cater to the upkeep and longevity of vehicles. This market has experienced significant growth due to the country's burgeoning automotive sector, which includes a diverse range of vehicles, from passenger cars to commercial fleets. The Saudi Arabian market's repair and maintenance services encompass a broad array of offerings, including routine maintenance, diagnostics, mechanical and electrical repairs, bodywork, and painting. These services are designed to ensure the safety, performance, and reliability of vehicles, a fundamental concern for both personal and commercial transportation. The market is characterized by its adaptability to the evolving automotive landscape. With Saudi Arabia's growing focus on sustainability and the emergence of electric vehicles (EVs), repair and maintenance services are expanding to accommodate the unique needs of these vehicles, encompassing battery

diagnostics, EV-specific components, and charging infrastructure. The market is driven by a combination of factors, including an increasing vehicle parc, which boosts the demand for regular servicing and maintenance. Additionally, the harsh desert climate and road conditions in Saudi Arabia make vehicle upkeep and maintenance a top priority to ensure longevity and optimal performance. The Saudi Arabian automotive sector is poised for significant growth, with the establishment of OEMs like Lucid Motors and Ceer Motors catalyzing the production of passenger vehicles. The Cluster's vision is to have 3-4 OEMs producing over 400,000 passenger vehicles in Saudi Arabia by 2030, with a target of achieving a local gross value add (LGVA) of 40%. The Vision 2030 program's emphasis on clean and autonomous mobility is expected to propel the industry forward, with an anticipated growth rate of 12% by 2030. As the number of vehicles increases, so does the demand for maintenance and repair services. The market is diversifying, with services extending beyond traditional repair to include advanced paint protection, vehicle care, and quick services. The rise in vehicle ownership and the growing popularity of off-road activities in the desert landscapes further drive this demand.

The automotive repair and maintenance market in Saudi Arabia is highly competitive, with a range of service providers, from independent garages to authorized service centers. As the nation continues to invest in its automotive infrastructure and consumer awareness regarding vehicle maintenance grows, the market is poised for further expansion and innovation. This industry not only supports the longevity and safety of vehicles but also plays a vital role in the overall health of the automotive sector in Saudi Arabia, contributing to its ongoing growth and development.

Key Market Drivers

Expanding Vehicle Parc

The growing number of vehicles on Saudi Arabian roads is a primary driver of the repair and maintenance services market. As the vehicle parc increases, there is a rising demand for routine servicing, repairs, and diagnostics, creating a robust market for these services. The substantial increase in public bus passengers and domestic road freight in Saudi Arabia for the year 2022, as reported by GASTAT, indicates a robust expansion in the use of road transport within the kingdom. It revealed that the number of passengers transported by public buses within and between cities during 2022 reached 43.5 million, an increase of 233.9% compared to 2021. This growth is a positive indicator for the automotive repair and maintenance services market, suggesting an upsurge in demand for vehicle servicing due to higher usage rates. The surge in public

transportation usage alone could lead to an increased need for regular maintenance and repair services, ensuring that the fleet remains operational and safe for passenger use. Additionally, the rise in road freight volume points to a greater number of commercial vehicles on the roads, which typically require more frequent servicing. This scenario presents a significant opportunity for service providers in the automotive repair and maintenance sector to expand their operations and offerings to meet the growing market demand. Strategic investments in service capacity, technology, and skilled personnel could position these businesses to capitalize on the increasing need for vehicle maintenance and repair services in Saudi Arabia.

Road Infrastructure Development

Saudi Arabia has made substantial investments in expanding its road infrastructure, including the construction of new highways and transport networks. The resulting increase in road usage and long-distance travel contributes to greater wear and tear on vehicles, necessitating more maintenance and repair services. For instance, in 2024, The Makkah region in Saudi Arabia is undertaking a major infrastructure development initiative by launching 20 road projects worth SAR1.4 billion (373 USD million). These projects aim to enhance connectivity, improve accessibility, and facilitate travel within the region, particularly during the Hajj and Umrah seasons. The initiative includes the construction of a direct road linking Jeddah to Makkah, the expansion of existing roads, and the addition of lighting and other improvements to reduce traffic congestion.

Growing Commercial Fleet

The nation's thriving logistics and transportation industry relies on a substantial commercial vehicle fleet, including trucks and delivery vans. This sector's growth fuels the demand for maintenance and repair services, as timely upkeep is critical to their operational efficiency.

Electric Vehicle (EV) Adoption

Saudi Arabia's interest in sustainable and electric mobility solutions is on the rise. The advent of electric vehicles introduces a new segment for repair and maintenance services, focusing on battery diagnostics, EV-specific components, and charging infrastructure, adding to the market's diversity. Saudi Arabia's automotive sector is undergoing a revolution as electric cars (EVs) are introduced and local manufacturing units are established. Lucid Motors, a California-based EV manufacturer, is one of Saudi Arabia's Public Investment Fund's (PIF) largest U.S. investments, with a peak

production capacity of up to 155,000 vehicles per year. Ceer Motors, a joint venture between PIF and Hon Hai Precision Industry Co. (Foxconn), is Saudi Arabia's first national automotive brand, with the goal of designing, manufacturing, and selling an innovative portfolio of EVs that will set the standard in e-mobility, connectivity, and autonomous driving technology.

Key Market Challenges

Shortage of Skilled Labor

One of the prominent challenges is the shortage of skilled automotive technicians and mechanics. A well-trained workforce is essential for providing high-quality repair and maintenance services. The industry requires ongoing efforts to attract and train skilled professionals to meet the increasing demand for services.

Environmental Regulations

The government's emphasis on environmental regulations and emissions standards presents a significant challenge. Service providers need to invest in tools, equipment, and technologies that ensure vehicles comply with stringent environmental norms, adding operational costs.

Rising Operational Costs

As vehicles become more advanced with complex technologies, the cost of maintaining and repairing them also rises. The need for specialized tools, diagnostic equipment, and training to address modern vehicles' issues places financial pressure on repair and maintenance businesses.

Competition from Authorized Service Centers

Service centers established by automotive manufacturers have a stronghold on the market, offering specialized services and leveraging brand recognition. Independent service providers face competition in offering comparable quality and reliability to attract customers.

Import Dependency

The automotive repair and maintenance sector is often reliant on imported spare parts,

which can be costly and subject to supply chain disruptions. The need for a stable and efficient supply chain for spare parts is crucial.

Key Market Trends

Digitalization and Diagnostics

The adoption of digital technologies and diagnostic tools is becoming increasingly prevalent in the industry. Repair and maintenance providers are incorporating advanced scanning and diagnostic equipment to identify and address vehicle issues more efficiently, enhancing service quality and customer satisfaction.

EV Service Expertise

With the growing adoption of electric vehicles (EVs), repair and maintenance services are expanding to include specialized EV training and repair capabilities. This trend ensures that service providers are equipped to handle the unique needs of EVs, including battery diagnostics and charging infrastructure.

Sustainability Initiatives

The automotive sector in Saudi Arabia is embracing sustainability practices. Repair and maintenance providers are gradually incorporating eco-friendly measures, such as the proper disposal of hazardous materials, recycling, and energy-efficient operations, to align with global environmental goals.

Advanced Vehicle Technologies

Modern vehicles are equipped with advanced technologies, including ADAS (Advanced Driver Assistance Systems) and complex computer systems. Repair and maintenance services are keeping pace by training technicians to work on these technologies and providing the necessary tools and equipment.

Preventive Maintenance Programs

There is a growing emphasis on preventive maintenance programs. Service providers are offering routine check-ups and maintenance schedules to help vehicle owners proactively address issues, extend the lifespan of their vehicles, and reduce the risk of unexpected breakdowns.

Mobile Repair Services

Mobile repair services, where technicians travel to the customer's location for minor repairs and routine maintenance, are becoming more popular. This convenient and flexible approach caters to busy lifestyles and reduces downtime for vehicle owners.

Online Booking and Transparency

Repair and maintenance services are increasingly offering online booking and transparent pricing models. Customers can schedule appointments and receive cost estimates online, enhancing convenience and trust in the service provider.

Segmental Insights

Service Type Insights

The automotive repair and maintenance services market in Saudi Arabia is experiencing rapid growth, particularly in the maintenance segment, due to a combination of factors. The increasing number of vehicles on the road is a significant driver. As the vehicle fleet expands, the demand for routine maintenance services, such as oil changes, tire rotations, and brake inspections, grows proportionally. This trend is supported by the rising disposable incomes of Saudi consumers, who are more willing to invest in vehicle upkeep to ensure longevity and performance.

The Saudi government's initiatives to enhance road safety and extend vehicle lifespans have bolstered the maintenance sector. Policies aimed at improving vehicle safety standards and regular inspection requirements create a steady demand for maintenance services. The country's Vision 2030 plan, which includes significant investments in infrastructure and urban development, also contributes to this growth by increasing vehicle usage and, consequently, the need for maintenance services.

Another contributing factor is the evolving automotive landscape, which includes a shift towards more complex and advanced vehicle technologies. As vehicles become more sophisticated, specialized maintenance services are required. This has led to the growth of specialized service centers that offer high-tech diagnostics and repair, catering to modern vehicles' needs.

The increasing awareness among vehicle owners about the benefits of regular

maintenance, including improved fuel efficiency and reduced risk of breakdowns, has further fueled demand. The expansion of service networks and the introduction of innovative maintenance solutions, such as mobile services and digital platforms for booking appointments, have also made it easier for consumers to access maintenance services, thus accelerating market growth.

The automotive maintenance segment in Saudi Arabia is expanding rapidly due to rising vehicle numbers, government policies, technological advancements, and increasing consumer awareness.

Regional Insights

The Northern & Central region of Saudi Arabia is the leading market for automotive repair and maintenance services. This dominance is attributed to several key factors. The region is home to major cities like Riyadh, the capital, which is the largest city in the country with a high population density and significant economic activities. The high number of vehicles in Riyadh leads to increased demand for repair and maintenance services. The region's robust infrastructure and well-developed road networks facilitate the growth of automotive services. The presence of numerous automotive dealerships and service centers enhances the accessibility and availability of repair services for a large customer base. Additionally, the high disposable income and greater awareness of vehicle maintenance among residents contribute to the region's market leadership. The Northern & Central region also benefits from government initiatives and investments aimed at improving transportation infrastructure, further boosting the automotive sector. The concentration of businesses and industries in this region, requiring regular maintenance of commercial and fleet vehicles, also plays a crucial role in driving the demand for automotive repair and maintenance services. Overall, the combination of population density, economic activity, infrastructure, and government support positions the Northern & Central region as the leading market for automotive repair and maintenance services in Saudi Arabia.

Key Market Players

Abdul Latif Jameel IPR Company Limited

Morni KSA

Ezhalha

E.A. Juffali & Brothers (Juffali Automotive Company)

Al Jazirah Vehicles Agencies Co. Ltd.

The Petromin Corporation

Aljomaih group (ACDelco Service Centers)

Haji Husein Alireza & Co. Ltd.

Mohamed Yousuf Naghi & Brothers Group

Aljabr Group

Report Scope:

In this report, the Saudi Arabia Automotive Repair and Maintenance Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Automotive Repair and Maintenance Services Market, By Service Type:

Repair

Maintenance

Saudi Arabia Automotive Repair and Maintenance Services Market, By Vehicle Type:

Two-Wheeler

Passenger Car

LCV

M&HCV

Saudi Arabia Automotive Repair and Maintenance Services Market, By Service Provider:

Automobile Manufacturers

Franchise General Repairs

Locally Owned Repair Shops

Saudi Arabia Automotive Repair and Maintenance Services Market, By Region:

Northern & Central

Eastern

Western

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Saudi Arabia Automotive Repair and Maintenance Services Market.

Available Customizations:

Saudi Arabia Automotive Repair and Maintenance Services Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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