Message from Riyadh Exhibitions Company

We at Riyadh Exhibitions Company Ltd. Aligning our mission with the Saudi Vision 2030, by positioning the Saudi Transport, Traffic and Logistics Exhibition to be a hub of communication and planning as the entire industry comes together to prepare for the transformation of the Kingdom. The exhibition represents a worthy step to enter the Saudi market and an important initiative to touch on issues that are affecting the economic movement in the Kingdom.

It also helps to support the dissemination of modern knowledge regarding developments in transport, traffic and logistics services as per the Kingdom’s Vision 2030, and to highlight best practices and introducing leaders’ experiences and global models. It is worth noting that the exhibition aims to keep pace with the continuous development in the transport and logistic services industry, in order to achieve the goals of Vision 2030 in making the Kingdom a global logistical center mainly dependent on transport in its various sectors.

Message from Maxwell Stamp KSA

We are witnessing together with the population of Saudi Arabia huge economic reforms driven around the Vision 2030 and its initiatives. Led by His Majesty Crown Prince Mohammed this is opening Saudi Arabia to a prosperous and empowered future.

"Nothing is more inspiring than to see the nation’s youth take hold of their destiny and join a prolific economic ecosystem”

Andrew Lippett General Manager
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Market Overview

Infrastructure and logistics are the key pillars of industrial development of a country. Infrastructure on highways, railways, airports, ports, and an efficient logistics network, allows all sectors to link both locally and globally.

In 1932, the Kingdom of Saudi Arabia lacked modern transportation facilities and ports. Today, the Kingdom has developed its transportation networks and advanced roads, airports, marines, railways and public transportation and logistics infrastructure. According to InvestSaudi sources, Saudi Arabia has invested USD 90 billion (SAR 337.5 billion) in road and railway development.

Saudi Arabia is a vital international logistics hub because of its geographical location in relation to the leading trade routes and it is amid three continents Asia, Europe and Africa. Also, it is considered the largest economy in the region.

In the past few years, the Kingdom has seen the most significant changes in the logistics industry. The market grew by USD 18 billion, which amounts to 55% of the total logistics market for all the Gulf Cooperation Council states (GCC) and it is anticipated to grow further, making the Kingdom’s logistics sector one of the fastest growing sectors in the world (Flanders investment & trade market survey report).
Recent developments in this sector have received investment that allows an increased capacity in the land, air and maritime, making the import and export operation more straightforward and accessible to neighboring regions.

As part of the Vision 2030, Saudi Arabia is seeking to attract investments worth up to USD 450 billion (SAR 1.7 trillion) in the next ten years as it launches the National Industrial Development and Logistics Program (NIDLP) aimed at developing new infrastructure. NIDLP intends to link between the industry, mining, energy and logistics sectors to develop infrastructure across the country (Al Arabiya English). The NIDLP expects to allocate contracts that are worth SAR 200 billion during the launch of this program that will exceed 330 initiatives (Construction week).

A large stake of this program will fulfil the objectives of vision 2030, which is to diversify the Saudi economy from being oil-dependent and shift towards the private sector economy that will be the primary driver. Private entities are encouraged to collaborate with the government as it develops the Kingdom’s infrastructure in seaport, airports and supply chain operations.
**Infrastructure Sector**

Governments allocate large budgets to build cities’ infrastructure for telecommunication, transportation, construction and logistics.

The transportation industry is booming in Saudi Arabia, and public transport is still under significant developments to fulfil the increasing demand in the region.

In 2018, the government announced an 86% increase in spending on infrastructure and transportation to SAR 54 billion (USD 14.4 billion), this investment was designed to help the Kingdom in achieving the goal of diversifying the income away from oil.

The Kingdom has a crucial pillar in its Vision 2030 to become a logistics hub for the whole region, this ambition is supported by the unique geographical location that gives it the capability to link and conduct trade across three continents: Asia, Europe, and Africa (Ministry of transportation). The strategy to achieve this goal includes improving the infrastructure’s quality, safety and efficiency by introducing an integrated transportation infrastructure master plan and an integrated Logistics bonded zone (ILBZ).
Innovations and Trends

Public Lighting

Globally, cities are transforming to become smarter and greener in many aspects, including streets, public buildings and as far as homes. One of the most important trends in this approach is the utilisation of solar energy. Solar energy is a renewable source of energy that can be used forever without being consumed, especially in the countries located near the equator where it is sunny all year. Public lighting is a crucial element in the street’s furniture as it helps to maintain drivers’ safety on the road and the pedestrians on walkways.

Instead of having the traditional fluorescent lamp, many countries have shifted to smart LED lamps powered by solar energy. Saudi Arabia has implemented this type of lighting in several of its cities, such as Riyadh, aiming to reduce pollutants created by gas emissions and to minimise the fuel consumption (Al-Riyadh daily).

In 2014, Riyadh municipality planned to install remote control systems over public lightings to analyse the energy consumption and to get real-time reports of any defaults that happen to get it fixed right away. Overall growth of this market projects to grow from SR7.5 billion in 2014, to SR93.75 billion by 2023 (Arab News).
Tunnel Construction Tools and Materials

Types of tools and materials

Materials for tunnels depends on the project, construction method and the design. Grout is used in stabilising soil or filling voids behind the tunnel lining, containing various materials, including sodium silicate, lime, silica fume, cement, and bentonite. Water used to help control dust after blasting and during drilling and often done with a low-freezing gelatin explosive.

A giant tunnel-boring machine (TBM) was launched in 2015 and is used as an alternative to drilling and blasting (D&B) methods. Seven gigantic TBMs have been manufactured especially for the Riyadh metro project, each ranging in length between 90 and 120 meters, and capable of drilling at depths of up to 30 meters safely below the surface achieving a smoother process.

It also, carries out many tasks, including moving soil, building tunnel walls, and laying railways inside tunnels with a circular cross-section through a variety of rock and soil layers. Inside the finished part of the tunnel are trailing support decks which are known as the back-up system, includes conveyors or other systems for muck removal, ventilation, electrical systems, control rooms, slurry pipelines and dust removal.
Road construction and maintenance

Road foundation with regular maintenance is critical and also essential to keep infrastructure healthy. It may also help in lowering costs by preventing constant repairs, decreasing vehicle operating costs and in addition to making it easier for drivers to navigate and maintain their safety.

a. Plastic roads

A revolution in Road construction process began with a specific technology used in the United Kingdom and India where plastic waste is cut into a specific size using a cutting machine and then the total mixture heated at 165 °C and transferred to the mixing chamber. This process is also very environmentally friendly, with zero toxic gases releases.

Saudi Arabia had its first plastic road when the consulting services department in Saudi Aramco experimented with the technology of "plastic road" inside a company-owned facility on Al Hawiya Road near Hofuf. The project was completed in cooperation with the Transportation and Equipment Services Department (T&ESD).

b. Road Maintenance

The Ministry of transport signed 112 road maintenance contracts in the Kingdom which process goes through two stages. The first stage is regular maintenance, which ensures the safety of roads and involves continuous periodic inspection for tunnels, roads repair, associated bridges, traffic signs and drainage pipes.

The second stage is preventive maintenance, which includes repairing or renovating bridges and drainage pipes, and, replacing the asphalt layers.

A road-mapping system provides data on non-pavement road elements such as traffic lines, road marker signs and traffic signs to help identify and evaluate maintenance that is required by collecting images in augment the data collection of the database. The Ministry of transport also uses this system to determine maintenance.
Rail technology

Railways have been essential transportation means for generations. In Saudi Arabia, the first railway was located in Hejaz, opened in 1908, connecting the border of Jordan to Al-Madina.

Currently, two companies own and operate railways in the Kingdom, Saudi Arabian Railway (SAR) and Saudi Railway Organization (SRO). Additionally, five railways are operating in the Kingdom fully operating, Dammam-Riyadh, Haramin Railway, Cargo lines, North-South line and Riyadh-Quarayyat Line.

Saudi Arabia is still expanding the railways and planning to construct new rails inline with vision 2030’s goals and as a driver of economic diversification away from oil. As a step towards coping with the technological revolution, SAR has contracted with Construcciones Auxiliar de Ferrocarriles (CAF) to install a digital platform on railways for six-passenger trains travelling between Riyadh and Qurayyat.

This digital platform allows for real-time monitoring and condition-based maintenance (CBM). The system will allow a consistent analysis of the data ecosystem, including all operation and maintenance activities.

Passenger Information Systems

The Kingdom is coping with today’s rapidly changing world and transforming its many sectors. The Ministry of Hajj and Umrah in cooperation with the Ministry of Communications and Information Technology launched the Smart Hajj application in 2018. It is providing smart solutions to ensure high-quality services for all pilgrims through enhancing their experience using comfortable and safe transportation.

This digitalisation allows real-time insights to optimise travel and crowd experiences. Capturing real-time insights of pilgrims using the Internet of Things, geospatial, and camera analytics, with data from the pilgrim experience mobile feedback platform. The service covers all the holy places and includes locating and navigation, defining rites, detecting Qibla (Kaaba) direction, and sending notifications of rush hours.

Furthermore, it groups several government apps ranging from airline tickets, hotels booking to pick up service across the two holy cities of Makkah and Madinah to facilitate easy access to all pilgrims.
Challenges

Environmental impact and safety

Potential environmental impact and safety are very critical of any road construction and maintenance projects. Technology is considered the main factor in increasing safety as it helps reduce the overall traffic flow throughout the project.

When less raw materials products are needed, less trucking support will be required, which translates to significantly less traffic on the road all day. Reducing vehicle emissions significantly as well, resulting in substantial, positive environmental impact.

Infrastructure project management standardisation

The Kingdom has been facing challenges in the standardisation of infrastructure project management and the potential opportunities in achieving its goals. In 2014 Mashroat’s launched a program to prepare a project management guide that is considered the first national reference of its kind in the Kingdom for controlling and governing infrastructure projects.

The primary tasks of the Infrastructure Planning Department include Five-year planning for the project portfolio, a comprehensive national plan for the integrated infrastructure and the preliminary planning for the project.
Al-Qunfudah Economical Airport

Al-Qunfudah Economic airport serves seven governorates and 50 administrative centres belonging to three mountainous and coastal regions. It is located just 25 km north of Al-Qunfudhah.

It will transport 215 to 707 passengers per week during the first phase, and it will serve more than half a million passengers annually from the people of the region and coastal governorates in addition to the Asir and Al Baha regions once completed.
**Facts and Figures**

**Location:** Al-Qunfudah

**Land:** 2,400,000 (km²)

**Announced:** 2010

**Date of start:** 2019

**Date of completion:** 2021

**Duration:** 2 years

**Investment:** SAR 840 million

**Special Features:**

- Transport 500,000 passengers a year
- Five aircraft, integrated infrastructure.
- There is one international flight and four foreign flights daily
- Transport 215 to 707 passengers a week in its first stage
Jubail railway network

The railway network project for Jubail is targeted and directed to develop the petrochemical sector and raise its efficiency.

The railway has a total length of 38 km and serves most of the industrial facilities in Jubail (1) and Jubail (2), directly linking Industrial port and commercial Jubail.

The goal of establishing this project is to transport chemicals from the Sadara complex to the neighbouring ports and industrial factories.
Facts and Figures

Location: Eastern Region, Jubail Industrial City

Land: n/a

Announced: 2011

Date of start: 2012

Date of completion: 2021

Duration: 10 years

Investment: TBD

Special Features:

• A significant track for the first and second industrial cities, with a length of 20 km
• The cargo capacity is 12,000 tons per day
• Aims to develop the petrochemical sector
Future Projects
Jeddah Airport cargo village

Air Cargo Village in Jeddah expects to make a qualitative leap in all shipping sectors in Saudi Arabia to facilitate freight services and solve the problem of delay.

The Cargo capacity after the completion of the first phase will be 1.5 million tons.
Facts and Figures

**Location:** King Abdulaziz International Airport

**Land:** 400,000 km

**Announced:** 2009

**Date of start:** 2019

**Date of completion:** 2022

**Duration:** 4 years

**Investment:** SAR 42.4 billion

**Special Features:**

- The cargo capacity is 3 million tons per year.
- The cargo capacity after the completion of the first phase will be 1.5 million tons.
Dammam, Qatif Public Transport projects

The project will link King Fahd International airport and King Fahd Causeway between the Kingdom and Bahrain. The project also aims to link the commercial centres of Dammam and Qatif cities.

The total length of the train network is 150 km, it contains four train stations, and the operating speed is 100 km per hour, while the length of the bus network is 350 km, covers 84 stations and is operated by buses with an operating speed of 70 km per hour.
**Facts and Figures**

**Location:** Eastern Region  
**Land:** 354 km  
**Announced:** 2014  
**Date of start:** 2015  
**Date of completion:** 2022  
**Duration:** 7 years  
**Investment:** SAR 60 Billion

**Special Features:**

- Fast speed network, transfer terminals and bus transportation.  
- The total length of the train network is 150 km; containing four train stations.  
- The length of the bus network is 350 km, covering 84 stations.  
- Occupying 7,000 parking spaces in all stations.
Key Players
Key Players

Road construction and maintenance

Al Namal Holding

Established in 1970, Al Namal Holding Company holds expertise in the of roads, dams, buildings, airports, water and sewage. Completed several projects in various fields. The company has implemented the most significant road project in the Kingdom, including Riyadh-Sudair Road Al-Qassim Highway and the Qurayyat airport.

Rail technology

Arabian Railway Company (ARC)

Established in 2007, formed from its parent company MIG, ARC specialises in railway services and carries out maintenance activities throughout the Gulf Cooperation Council. It is one of the most famous names in the railway industry in the Middle East.

Trapeze

Trapeze has 50 years of experience. Their products and solutions support both public and private transport companies, through control systems.

The company develop, provide and support information technology solutions and services, intelligent transportation and ticketing systems, and offer many products that ensure passengers reach their destinations quickly and comfortably.

Urban design and civic infrastructure

AECOM Company

Established in 1966, AECOM is a professional company providing infrastructure services - ranging from planning, designing and engineering to consulting and construction management.

Specialising in complex projects

Salini Impregilo

Salini Impregilo is an Italian company and an industrial group specialising in building large and complex projects for more than 100 years, such as railways, highways, metro systems, airports, hydroelectric stations and hydraulic works, with a turnover of about 4.7 billion euros.
Leading infrastructure development contractor

Mutlaq Al-Ghuwayri Contracting

Established in 1977, Mutlaq Al-Ghuwayri Contracting Company Ltd has been keen to provide all the means and elements of success for business and projects. The focus is in the field of contracting implementation and maintenance of roads, bridges, water networks, buildings, dams, landscaping and site planning. The company has provided quality comprehensive services and infrastructure projects in the Kingdom of Saudi Arabia.

Alarrab Contracting arrab

Founded in 1983, it is a subsidiary of Al Rajhi Holding group. The company has worked on the implementation of the Haramain train, at the cost of 14 billion dollars, linking Makkah and Madinah via Jeddah.

Al-Harbi Trading and Contracting Company

Al-Harbi Company was established in 1965 and succeeded in the field of construction. Al-Harbi Company specialises in the implementation of difficult highways, and sophisticated ways to construct roads in valleys, mountains, paved roads and bridges. The company carried out many large government projects and infrastructure projects such as the King Abdullah Economic City project.

Alomaier Trading and Contracting Co

Established in 1977, the company has achieved distinction in building roads and bridges and has also achieved successes in the field of railways with high efficiency.

Philips

A leading and internationally renowned company in the field of lighting. Philips systems and products enable to take care of energy efficiency and the quality of lighting, save energy and improve road safety with connected street lighting systems.
About Us

Riyadh Exhibitions Company

Riyadh Exhibition Company (REC) was launched in 1980's in Riyadh, Saudi Arabia. It has been a major contributor offering a range of organizing services for trade shows, conferences, conventions, and events. REC has planned and executed more than 440 events in different economic sectors in the Kingdom. The vision is to support the Saudi Market by bringing together supply and demand through organized events. Supporting the Mission and the Vision, REC emphasis on 5 core values, Diversity, Collaboration, Trust, Development and Creativity.

REC has done exhibitions for different sectors and industries including Healthcare, Electricity, Agriculture, Plastic and Petrochemicals, Print and Packaging, Transport and logistics and Saudi Build for Construction.
Maxwell Stamp KSA

With a long and successful track record, Maxwell Stamp is committed to providing high-quality consulting services across the Middle East. As part of this commitment we have established regional offices in Riyadh and Abu Dhabi, staffed by a mix of expatriates and locals.

Our regional presence and long track record give us a clear understanding of local markets and practices. We also have a network of contacts throughout the public and private sectors in most countries in the region. Our Middle East offices have a strong record of delivery in Saudi Arabia, and we have worked extensively elsewhere in the GCC and the wider MENA region.

As an economics consultancy, applying sound economic principles to problem-solving is at the heart of what we do. However, the scope of our work and the range of our clients have diversified well beyond the traditional fields in which economists operate. We have developed expertise across a wide range of competencies and policy areas, ranging from international trade to rural livelihoods, from privatisation to revenue administration, from health to financial sector analysis.
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