



30th of January 2023

French-Saudi strategic
partnership to design the airport
of tomorrow

1st Edition



With the support :



French Airport Day



With the collaboration :





French Airport Days : meet 21 French major players in the Airport sector





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**His Excellency Eng. Ali Al-Jasser,
Minister of Transport and Logistics
to Saudi Arabia**



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**Karim Bekkouche,
Middle East Policy Officer,
Direction Générale de l'Aviation Civile (DGAC)**



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**Elodie de Cazenove,
PROAVIA**



**making security and safety
a priority**



**creating solutions
for smart airports**



**making green airports
a reality**



our catalogue

**PROAVIA Association groups together
50 French specialised companies to address airports new challenges**

with the support of





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**HE Abdulaziz bin Abdullah Al-Duailej,
President of the General Authority of Civil
Aviation (GACA)**



THE NATIONAL AVIATION SECTOR STRATEGY



الاستراتيجية الوطنية للطيران
SAUDI AVIATION STRATEGY

January 2023



5 KSA priorities for the aviation sector



- Accommodate demand from National Tourism Strategy



- Be a global connecting hub for international transit PAX



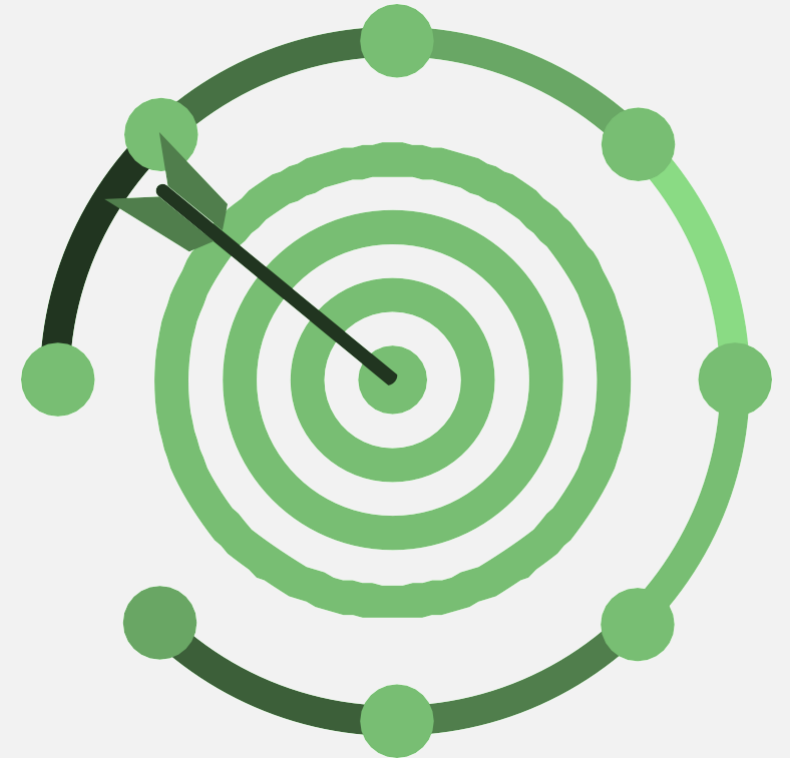
- Drive economic growth in KSA (both
• GDP & creation of jobs)



- Grow a sustainable Aviation sector with attractive returns



- Deliver world-class experience to passengers



The Aviation 2030 strategy has set specific strategic objectives across five areas: network, airlines, airports, aviation services and funding...



ASPIRATION

Sector vision: EMPOWER VISION 2030 AND BECOME AVIATION SECTOR #1 IN MIDDLE EAST

Enable National Tourism Strategy (300M PAX) and serve national air cargo needs (2.5M tons)

Upgrade KSA to become a global transit hub (30M PAX) and global air cargo hub (2.0M tons transit)

STRATEGY

- 1 NETWORK**  Extend KSA connectivity to **250+ destinations** across 29 airports with **RUH and JED** serving as **2 global PAX long-haul connecting hubs and global air cargo hubs** leveraging belly capacity
- 2 AIRLINES**  Increase **local LCC share and local carrier competitiveness**, with **JED hub served by Saudia and Saudia Cargo**, and **RUH served by new PAX carrier with Cargo operations**
- 3 AIRPORTS**  Upgrade infrastructure and operations, including **airport PAX capacity and experience in line with Tourism Strategy**, and **state-of-the-art Cargo facilities** at level of regional peers (UAE, Qatar, Turkey)
- 4 SERVICES**  Move from monopoly to **fair competition** (particularly in Ground Handling and MRO) and step up **local players competitiveness** to raise service levels
- 5 FUNDING**  **Government investment of SAR 60-110B** required until 2030
Total CAPEX required to 2030 is SAR 365B – difference funded by **private sector, debt funding, leasing**

Aviation Strategy - Key Figures



Fuels KSA
Vision 2030



Enables KSA
Tourism Strategy




Boosts KSA
Aviation sector

<p>#5</p> <p>Global PAX connecting hub (vs #35 in 2018)</p>	<p>#1</p> <p>Regional cargo hub (vs. #4 in 2018-19)</p>	<p>280B</p> <p>SAR in total sector GDP (vs 80B in 2018)</p>	<p>1.1M</p> <p>total jobs in sector (vs 315k in 2018¹)</p>
<p>75M</p> <p>International visits (vs 15M in 2018)</p>	<p>45M</p> <p>Domestic visits (vs 26M in 2018)</p>	<p>15%</p> <p>Tourism GDP unlocked through Aviation</p>	<p>2.0M</p> <p>Tourism jobs unlocked through Aviation</p>
<p>#1</p> <p>Aviation sector in Middle East (vs #3 in 2018)</p>	<p>#7</p> <p>PAX market worldwide (vs #21 in 2018)</p>	<p>2</p> <p>Globally relevant PAX & Cargo carriers (none in 2018)</p>	<p>2</p> <p>Globally relevant PAX & Cargo hubs (none in 2018)</p>




Flagship Projects

Aspiration



330M PAX in 2030 (300M in O&D1, 30M in Transit)
4.5tons Air cargo in 2030 (2.5tons serve national air cargo needs , 2.0tons global air cargo hub in Transit)

Extend KSA connectivity to 250+ destinations with JED & RUH serving as 2 global PAX long-haul hubs & global air cargo hubs


Initiatives

 **Airlines**

- Dakota
- Saudia Transformation
- NEOM Airline

 **Airports**

- Runway (RUH)
- JED Airport
- NEOM Airport

 **Cargo & Logistics**

- ILBZ
- Air Cargo Village RUH
- Air Cargo Village JED
- Air Cargo Village DMM

 **Regulations, Governance and Transformation**

- Block hour **cost optimization**
- Assets' transfer**
- Air Connectivity program**

 **Sub-Strategies**

- Cascade **sector strategy** into strategies of stakeholders
- Detail **cargo strategy** and masterplan for JED/RUH/DMM
- Adapt **Saudia Cargo** strategy to KSA air cargo strategy
- Aviation sector's **human capital** development plan
- Develop **airport strategy** & capacity expansion plan for all 29 airports
- Privatization strategy**



Funding: ~365B SAR CapEx required by 2030 for sector strategy

*Total funding
required by Private
and Public sector*

**~365B
SAR**



Passenger strategy

345B SAR

Expansion of KSA airports¹

190B SAR

Aircrafts of local carriers (incl. new carrier)²

155B SAR



Cargo strategy


19B SAR

Air freighters

17.3B SAR

Warehouse expansion & facilities upgrade

1.4B SAR

The background of the slide features a repeating pattern of airplane silhouettes in a light beige color, arranged in a grid-like fashion that tapers off towards the right side. The main title is centered in the lower half of the slide.

SECTOR KEY AWARDS AND PROGRESS

Airports 2022 (1/2)



KKIA AIRPORT OPENS TERMINALS 3 AND 4 AND WINS SKYTRAX AWARD FOR MOST IMPROVED AIRPORT

- Initiation of operations in International terminals 3 and 4
- Drastic shift in airport customer experience
- Major development of the main touchpoints in the passenger journey
- Ranking on “world top 100 airports” jumped from 58th to 29th
- #3 as the best airport in the Middle East



KING KHALID INTERNATIONAL AIRPORT LAUNCHES ADVANCED CONTROL CENTER

- Improve decisions making based on real-time information and enables punctuality, and process quality
- Boost operations efficiency and sustainability, and improve passenger experience



KING FAHD INTL. AIRPORT WINS THE BEST REGIONAL AIRPORT IN THE MIDDLE EAST

- Noticeable upgrade in airport services and facilities
- Key upgrades to commercial facilities by providing a mix of options to passengers
- #3 as the most improved airport in the world
- Ranking of “world top 100 airports” jumped from 87th to 50th



Airports 2022 (2/2)



KING ABDULAZIZ INTL. AIRPORT RANKED 8th BEST AIRPORT IN THE WORLD (CAPACITY OF 10-15 MN PAX)

- Real opportunities for changes due to the expansion of Terminal 1
- Major improvement of services provided to passengers
- #6 as the best airport in the Middle East
- Ranking of “world top airports” jumped from 50th to 44th



PRINCE MOHAMMAD BIN ABDULAZIZ INTL. AIRPORT WINS 2nd BEST REGIONAL AIRPORT IN THE M.E

- Drastic shift of the various categories of frontline products and services
- Major enhancement of check-in, customs, security, and passport control services
- #3 as the best airport in the world with capacity of less than 2 million passengers
- Ranking of “world top 100 airports” jumped from 68th to 58th



THE RED SEA DEVELOPMENT COMPANY SIGNS AN AGREEMENT WITH DAAI TO MANAGE OPERATIONS

- Dublin International will be the operator of the Red Sea International Airport in 2023, as it undertakes the tasks of supervising design consultations, administrative operations, and operations in accordance with the requirements of the General Authority of Civil Aviation in the Kingdom of Saudi Arabia (GACA) and the International Civil Aviation Organization (ICAO).
- It is set to enable the airport in its journey towards environmental sustainability based on the principle of 100% renewable energy



Air Transport 2022 (1/2)



SAUDIA AIRLINES WINS THE MOST IMPROVED AIRLINES IN THE WORLD (2021)

- Saudia enhanced the quality of its airport and onboard products and staff services. Thus, they have received a 4-star Airline certificate from Skytrax
- #4 as the best airline in the Middle East
- #5 as the best economy class airline seats in the world



SAUDIA WINS TOP SUSTAINABILITY AWARD FOR CUSTOMER ENGAGEMENT

- Operated world's first in-flight sustainability lab on a Jeddah to Madrid flight (world's longest carbon net-positive flight) to crowd-source ideas from guests on greener air travel (in-flight, time spent at airport and arriving at destination)
- Winner of the customer engagement category in the SkyTeam Sustainable Flight Challenge



FLYADEAL INTRODUCES NEW A320NEO AIRCRAFT TO RAISE FEET SIZE TO 26

- Reveal of a new A320 Neo, bringing Flyadeal fleet to 26 aircrafts
- Fleet expected to reach 32 aircrafts by end of 2023



Air Transport 2022 (2/2)



FLYNAS TO BECOME THE LARGEST LOW-COST AIRLINE IN THE MENA REGION

- Board of Directors announced plan to increase Aircraft fleet to 250 aircraft
- Flynas wins the world travel award as the best low-cost airline in the Middle East in 2022




WIZZ AIR INTRODUCES NEW ROUTES TO SAUDI ARABIA FROM EUROPE AND THE UAE

- Wizz Air, Europe's fastest growing and most sustainable airline, is launching new routes from Dammam, to Rome, Vienna and Abu Dhabi, supporting the growing Saudi Arabian tourism sector




Aviation Services 2022




 **SGS LAUNCHES ENVIRONMENTALLY FRIENDLY FLEET AND IMPROVES ITS FINANCIAL PERFORMANCE**


- Deployed an environmentally friendly fleet of Ground Services Equipment (GSEs) in Saudi airports in various Categories (PAX steps, Baggage Conveyor Belts, Pushback, Passenger and Crew buses)
- 2022 revenues surged by 28%
- 2022 losses dropped by 44%

 **NEOM INVESTS \$175 MLN IN VOLOCOPTER TO ACCELERATE ELECTRIC URBAN AIR MOBILITY**

- Announced a \$175 million Series E investment in Volocopter, the pioneer of Urban Air Mobility,
- NEOM-Volocopter joint venture will operate electric air taxi services in NEOM to connect various regions including THE LINE, OXAGON and TROJENA

 **SAUDIA AND LILIUM PLAN TO LAUNCH ELECTRIC AIR MOBILITY**

- SAUDIA and Lilium N.V., developer of first all-electric vertical take-off and landing “eVTOL” jet, announced an (MoU) for the development and operation by SAUDIA of an eVTOL network across Saudi Arabia
- With zero operating emissions, the Lilium Jet will enable sustainable and time-saving travel

 **HELICOPTER COMP. LAUNCHES SAUDI NATIONAL AIR AMBULANCE PROGRAM AND GRADUATE THE FIRST BATCH OF PILOTS**

- Launch of the Saudi National Air Ambulance Program in collaboration with The Saudi Red Crescent Authority
- Launch of THC’s Qimmam Aviation Program, and the graduation of the first batch of Saudi Female & male young Pilots
- Signed agreement with Leonardo Helicopters for the purchase of 16 AW139 helicopters
- Signed agreement with Airbus Helicopters for the purchase of a total of 26 helicopters, including 20 H145 & 6 H160.





CORPORATIZATION OF AIRPORTS

- All airports in the Kingdom have been corporatized in early 2022, in addition to separating the operational side from the legislative side, and transferring the task of operating airports to the Saudi Civil Aviation Holding Company.



THE FUTURE AVIATION FORUM

- The inaugural Future Aviation Forum redefined Saudi Arabia as a global leader
- The forum had +2400 attendees from +20 countries, with +170 speakers



ICAO COUNCIL MEMBERSHIP

- Saudi Arabia was elected for the International Civil Aviation Organization (ICAO) Council membership for the 2023-2025 term at the 41st ICAO assembly, with over 90% of votes from member countries.





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Eng. Suleiman Al Bassam
Matarat Holding
CEO

matarat
Holding

Matarat Holding

Jan 2023



The aviation sector is at the heart of VISION 2030



"Our Vision: Saudi Arabia... the heart of the Arab and Islamic worlds, the investment powerhouse, and the hub connecting three continents"



Theme 1:
A vibrant society



Theme 2:
A thriving economy



Theme 3:
An ambition nation



BY 2030, WE WILL ...

- "UNLOCK POTENTIAL OF NON-OIL SECTORS"
- "SERVE MORE UMRAH VISITORS BETTER"
- "POSITION KSA AS A GLOBAL LOGISTIC HUB"
- "GROW CONTRIBUTION OF THE PRIVATE SECTOR TO THE ECONOMY"

The mandate of MATARAT is pivotal to majority of Vision Realization Programs enabling economy through trade and mobility



Direct

In-direct

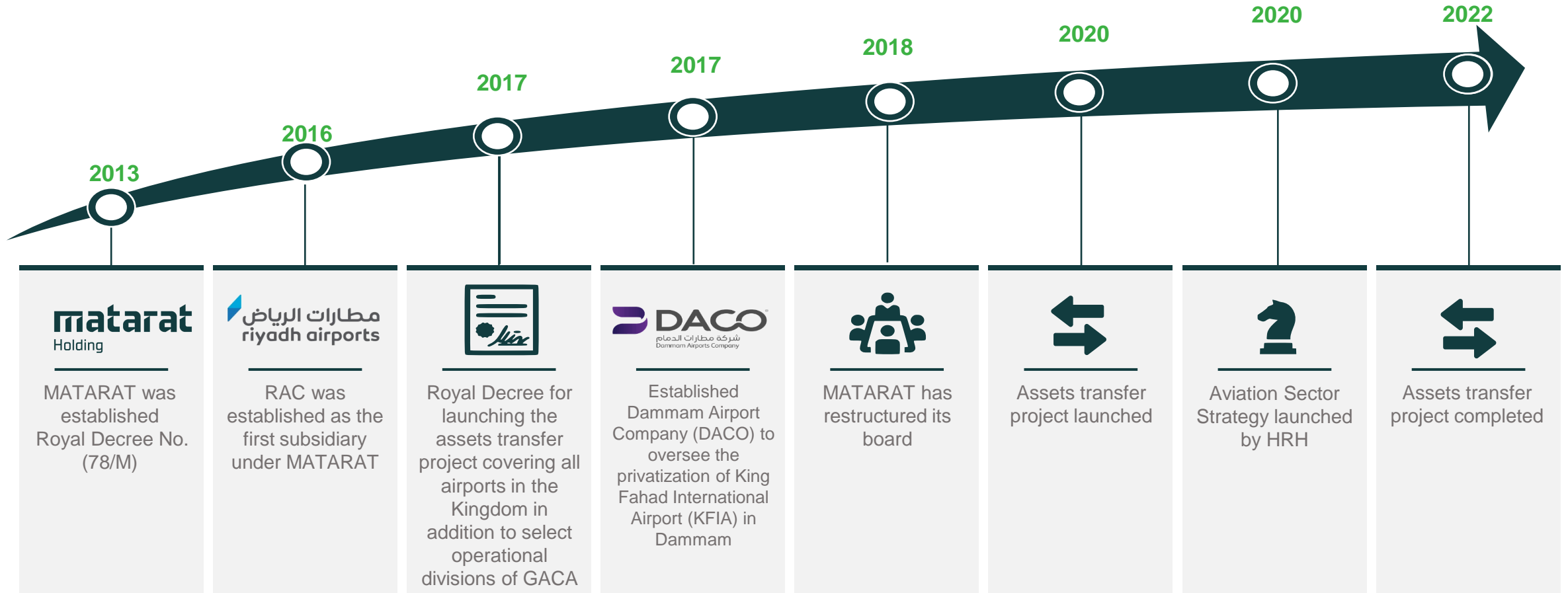


Delivered through 13 VRPs on 3 key themes: a vibrant society, a thriving economy and an ambitious nation



	New direct and indirect jobs creation	Partnerships with private sector	New domestic & international routes	Passengers & customers served
	Contribution to GDP	Spend on infrastructure development	Foreign direct investment attractions	New airlines commenced

Before 2023, MATARAT was successfully able to full corporatize KSA airport to cater with the NAS.



Scale of the Assets Transfer



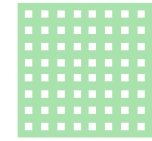
The exercise involved moving scores of assets, employees, contracts and systems from GACA to MATARAT or its subsidiaries



29
Airports



130+
Fixed Assets



700MN+ sqm
of Land²



6000+
Employees



400+
Contracts



30+
ICT Systems

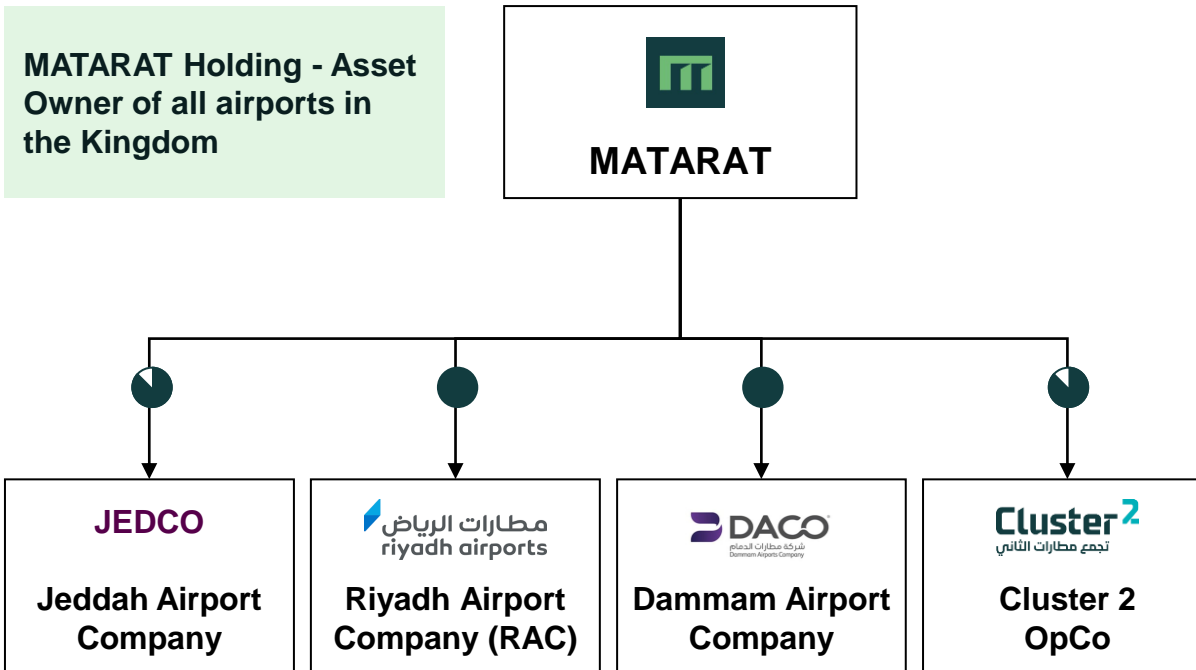
2- Excluding KKIA, KAIA and KFIA land plots

MATARAT Portfolio

By end 2021 the assets transfer exercise were completed, and MATARAT will have 4 OpCos and 27 airports in its portfolio



MATARAT Group

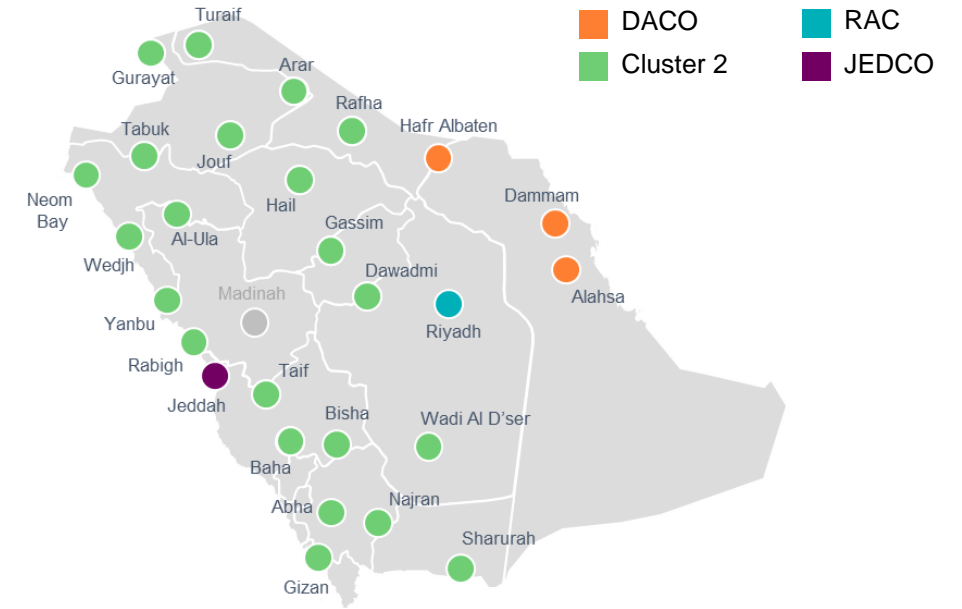


MATARAT Subsidiaries - Management and operations of airports

Assets Transfer Almost Complete

Assets Transfer Complete

MATARAT airports and Key Figures



29 Airports	103 M PAX In 2019	7.1BN SAR 2019 revenues	2.5BN SAR 2019 EBITDA
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The Aspiration of the National Aviation strategy sets 5 priorities for PAX



Accommodate demand from **National Tourism Strategy**



Be a **global connecting hub** for international transit PAX



Drive **economic growth** in KSA (both GDP & jobs)



Grow a sustainable **Aviation sector** with **attractive returns**



Deliver **world-class experience** to passengers

Ambitious targets in line with the Vision 2030 and the National Aviation Sector Strategy have been defined for MATARAT



Sector Strategy Targets



MATARAT areas of focus (2023-2025)



- 1 **Synergize all airports** under MATARAT to standardize operations and deliver efficiencies
- 2 **Elevate end-to-end best class customer journey**
- 3 **Enable national carriers' success** by building the **proper airport infrastructure and operations**
- 4 **Elevate MATARAT** to become a **National Champion and Regional Leader**
- 5 **Lead the Private Sector Participation** program by **attracting investors and int'l operators**
- 6 **Develop an ecosystem of players and partners** to support the growth aspirations
- 7 **Secure** the sector **sustainability and environmental friendliness**
- 8 **Upskill MATARAT+ workforce** and **build** an aviation **talent pool of the highest standards**
- 9 **Develop an integrated 30-year masterplan** for all airports that **caters for the NAS' aspirations**

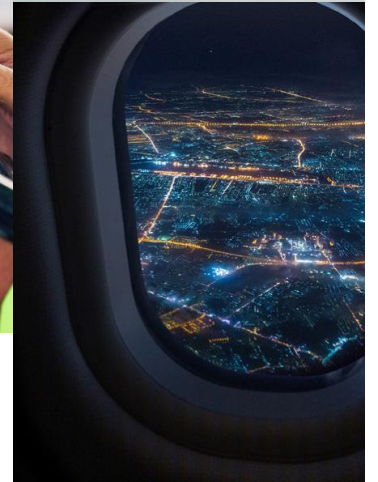
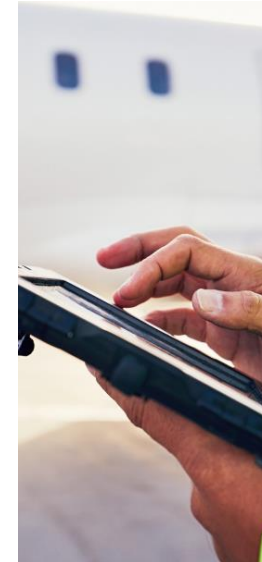


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**Mr. Mohammed Alshaikh,
United Aviation,
Chairman of the Board Directors**



1

United Aviation Company is a Saudi company specialized in providing many services in the aviation industry.

2

All executives and employees of the company are equipped with extensive knowledge of the requirements and associated policies and procedures of Civil Aviation Authority, airports, relevant government agencies.

3

The services will be provided with the partnership of one of the global Ground Services Company.



Who we are ?.

4

United Aviation Company is committed to providing the highest quality Aviation Ground Services that are both eco-friendly and powerful, with an emphasis on creating a unique experience for airlines and passengers to improve aviation performance in the 29 airports in Saudi Arabia.

5

On top of ground handling, we provide Door to Door services and Logistic Servies.



Providing Ground Handling Services at the highest standards for airlines operating at all 29 KSA airports through highly experienced and skilled employees, advanced ground equipment, and most sophisticated systems.

Competitive Advantages

United Aviation Company is specialized in providing many services in the aviation industry. We provide a wide range of innovative ground handling services at all airports in the Kingdom of Saudi Arabia. Our operations are managed by a highly dedicated staff with extensive aviation industry knowledge and skills supported by our partnership with one of the most globally successful ground handling services providers.



Competitive Advantage:

1. Well experienced executives in the aviation industry.
2. Partnership with one of the most globally successful international Ground Handler.
3. Brand-new Eco-friendly equipment's with latest technology.
4. Most advanced IT GHA systems in all operations and management activates.
5. Off Airport – Door to Door services.



Strategic objectives of GACA



Increasing the number of passengers to 330 million annually.



Achieving the 5th rank globally for air connectivity for passengers.

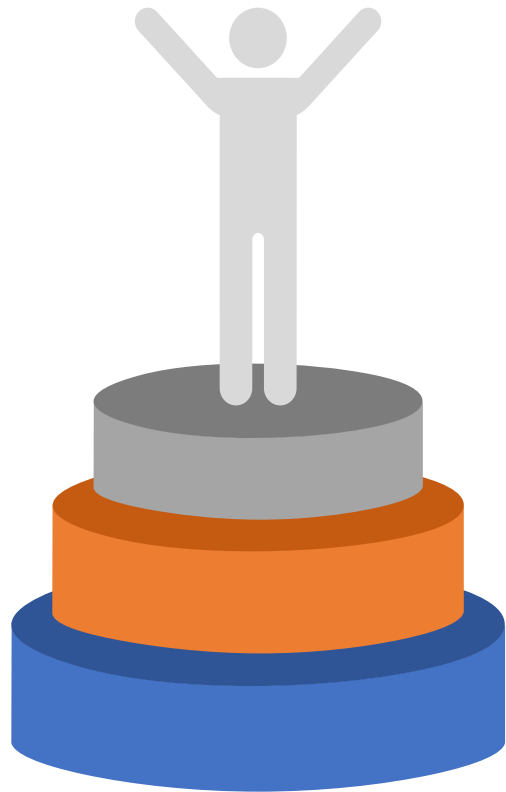


Serving 250 international destinations.



Improving quality of services through introducing new competitors in the ground handling and maintenance services sector

The commitment of our Company



The main action completed within 03 Months reflected our Company commitment:

- **19OCT2022** Meeting with H.E. GACA and agreed for our Company plan and get his support.
- **20OCT2022** Submitted our requested for GHA certificate at all 29 Airports to GACA.
- **04NOV2022** Signed Partner Agreement with international GHA (Group Europe Handling).
- **20NOV2022** Delivered all documents required for GACA Economic Certification.
- **14DEC2022** Received all GACA Airports Certificates.
- **06 JAN2023** Group Europe Handling Managers started work in KSA with us.
- **23 JAN2023** All Operation of United Company procedure and Manual delivered to GACA.

GACA License & Strategic partnership with a key market player



بحضور معالي وزير النقل والخدمات اللوجستية المهندس / صالح الجاسر ومعالي رئيس هيئة الطيران المدني الأستاذ / عبدالعزيز الدعيج لإجتماع اللجنة التوجيهية لتفعيل الاستراتيجية الوطنية للطيران

الشركة المتحدة للطيران تحصل على تراخيص تقديم خدمات المناولة الأرضية في مطارات المملكة



In the presence of His Excellency the Minister of Transport and Logistics Services Eng. Saleh AlJasser and His Excellency the President of the Civil Aviation Authority Mr. Abdulaziz Al-Duailej for the Steering Committee meeting to activate the National Aviation Strategy

United Aviation Company obtains licenses to provide Ground Handling services at the Kingdoms airports



PARTNERSHIP LETTER

This letter Just to announce about there is partnership Agreement and APPENDIX 1 for technical assistance Included provided consultant and Managers working in KSA Airports from GROUPE EUROPE HANDLING to UNITED AVIATION COMPANY referred according to all condition in the main AGREEMENT.

For GROUPE EUROPE HANDLING	For UNITED AVIATION COMPANY
Mrs Nathalie JAOUI	Mr. Mohammed Alshaikh
	
Chairwoman and Chief Executive Officer	Chairman of the Board of Directors

Our Services

Passenger Services



Baggage Services



Ramp Services



Cargo Loading
Off Loading Services



Fleet Services



Traffic Control
Services



Transport Services



Door to Door Services



Aircraft Turnaround
Services

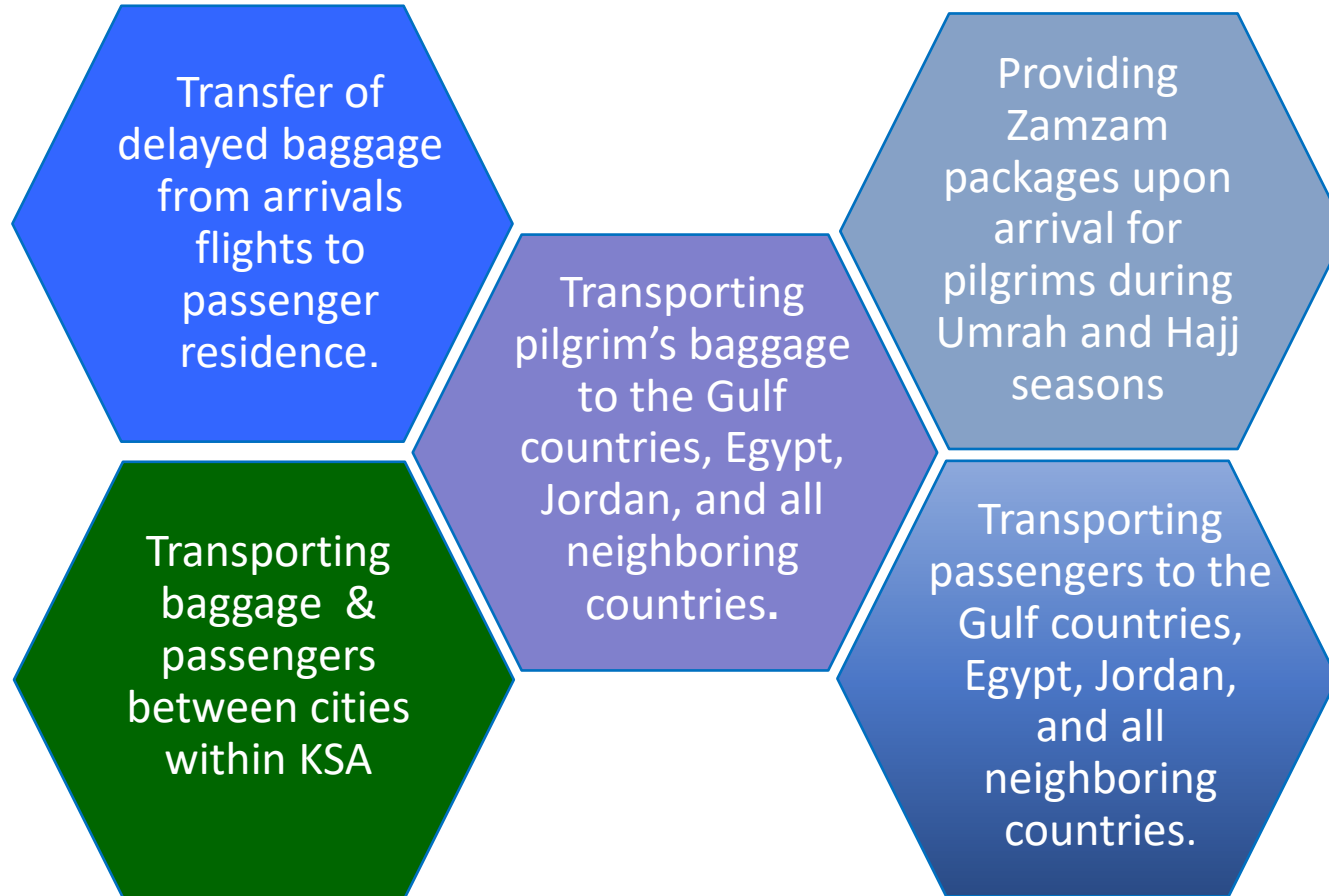


Logistics services



المتحدة للطيران
UNITED AVIATION

Logistics services



**Services proposal
from the residence
and from the
Airports (Door to
Door)**



المتحدة للطيران
UNITED AVIATION

Door to Door



Amadeus Laptop



SITA Laptop



❖ **Booking and requests services**

UCA provides the latest methods for booking control services in an application that simulates all services in accordance with the required service standards in order to facilitate the booking mechanism and provide services slots appropriate to the customer's time. This application is available on the company's website as well as electronic application stores for smart devices with its systems (IOS - Android).



Stages of check-in for passengers departing

Finalizing All the check-in processes for the passengers and their luggage. and provide them with the boarding pass and baggage tags at the residence.



1



2

Transfer the baggage
Before 5 hours to the
airport

Delivery of luggage in the airline luggage
acceptance areas and ground services at King
Khalid International Airport 3 hours before
departure.

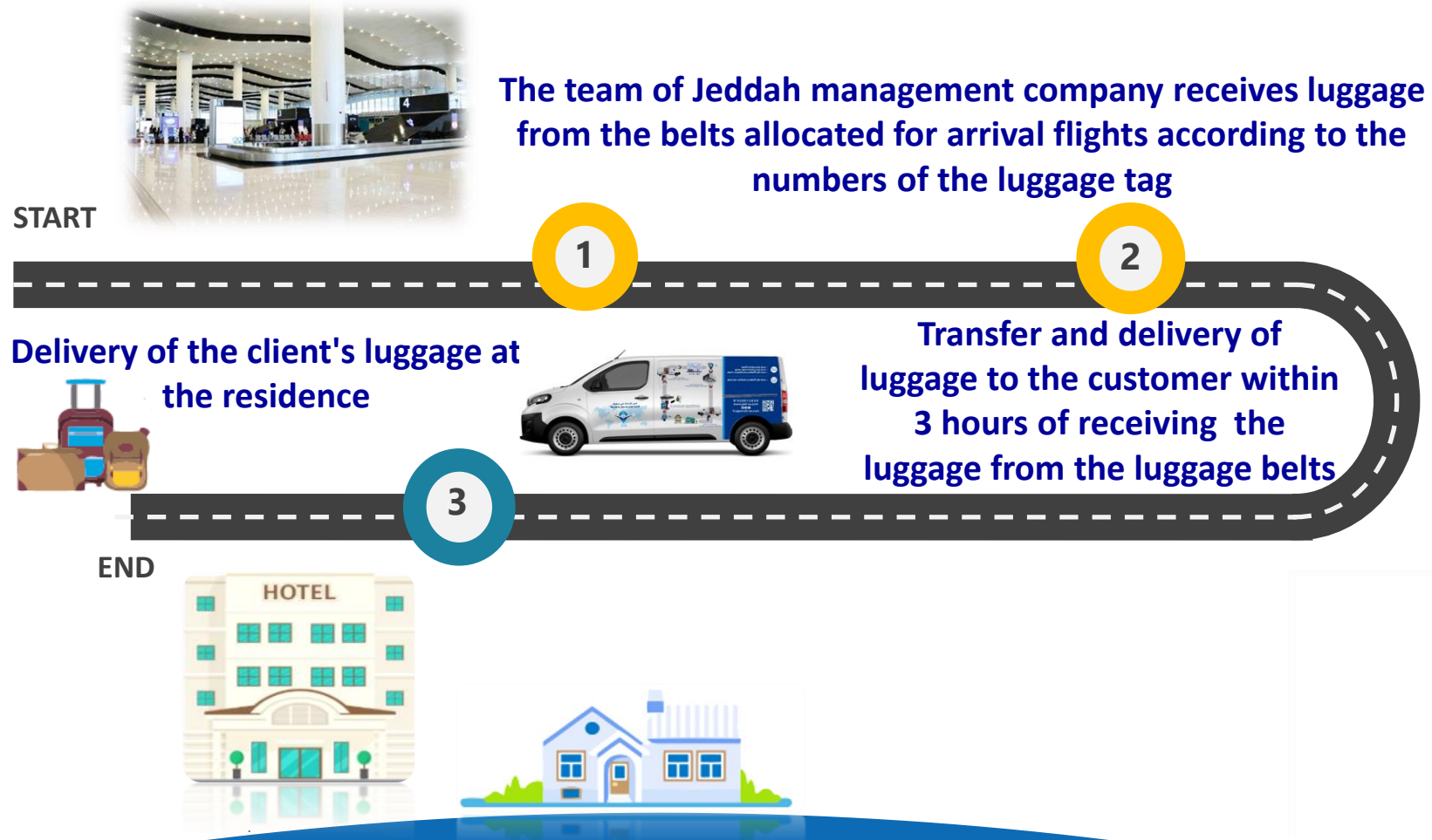


3

END



Stages of the delivery of arrival luggage

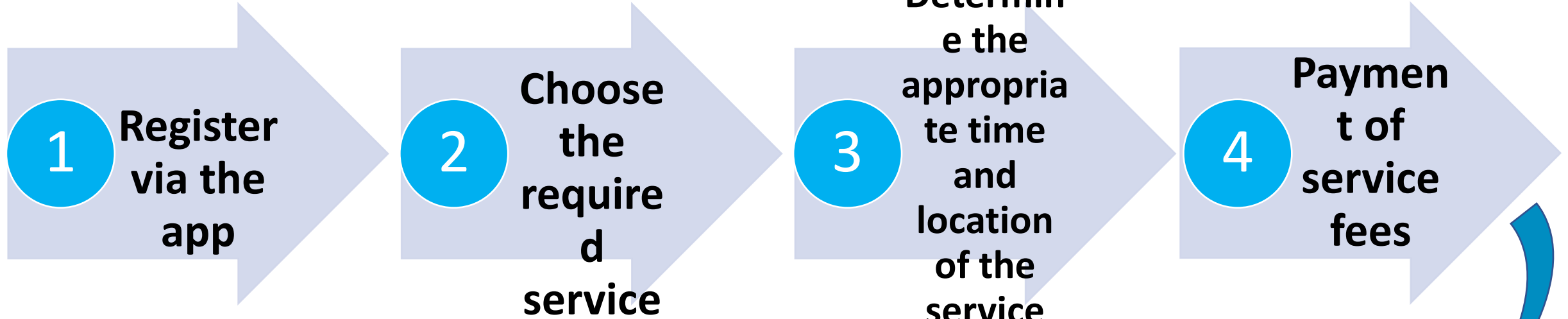


Zamzam packages request mechanism



المتحدة للطيران
UNITED AVIATION

The journey of requesting the service through the application or the website on the Internet

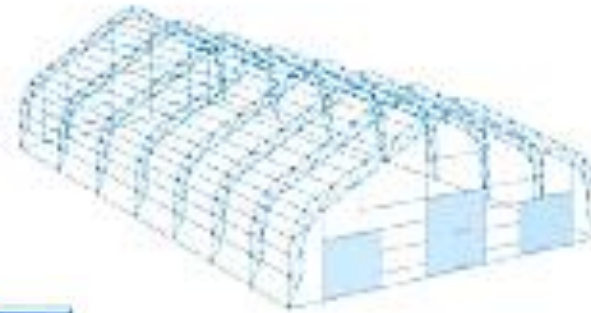


APP

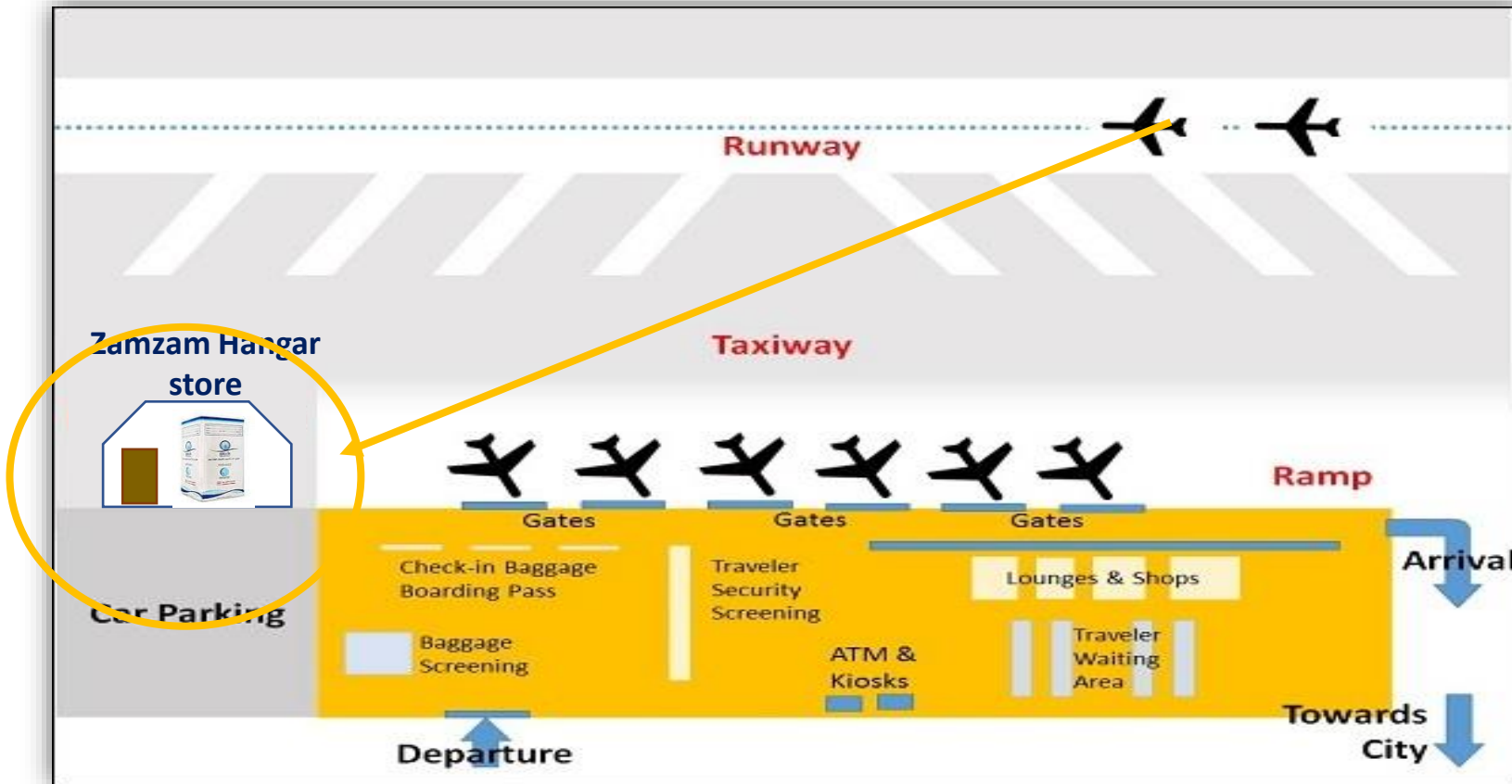


The service building inside the airport yard

Design structure for facilities (metal hangar)



The service building inside the airport yard



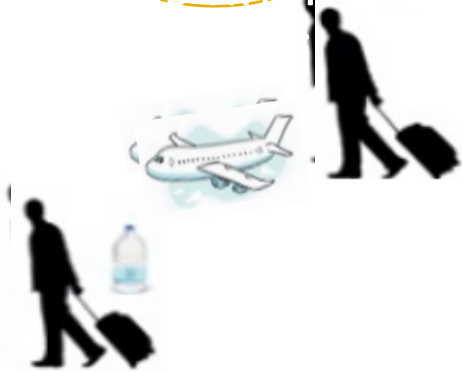
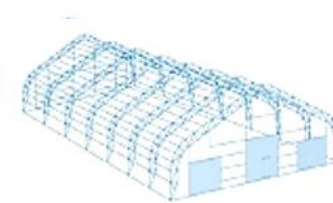
Service implementation mechanism

will receive his Zamzam packages upon his arrival at his final destination

load the packages according to their scheduled flights

yard, pasting it on the packaging, photocopying it, and sending it

application of the JMC, and the luggage tag is printed



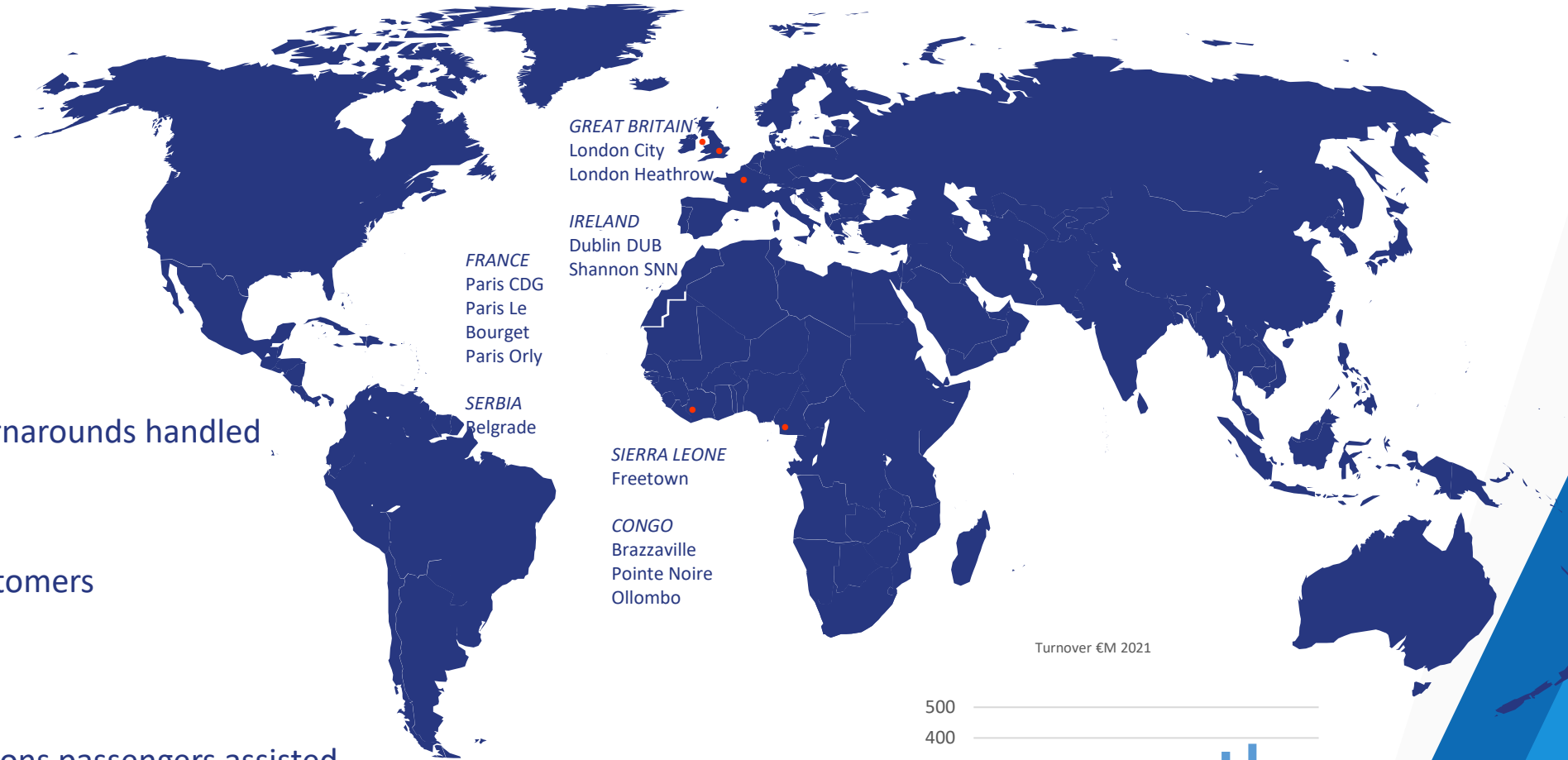
Our Partner Groupe Europe Handling





History





218,000 turnarounds handled

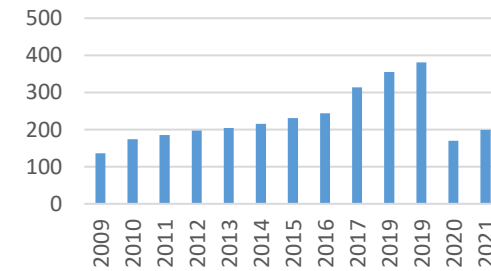


155 customers



32 millions passengers assisted

Turnover €M 2021





Lufthansa Group





Our Customer Portfolio at Heathrow Airport



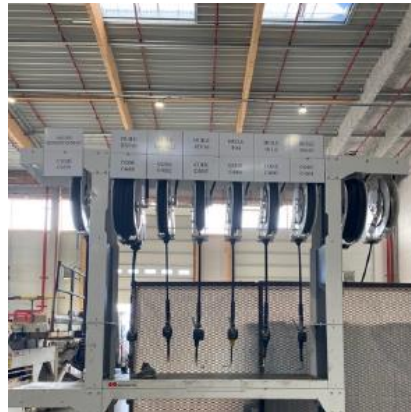
Our Partners in Ireland

	Etihad		Transavia
	Air Transat		Fedex
	Air France		Qatar Airways
	Lufthansa		ASL Airlines
	SAS		Aer Lingus Regional
	Norwegian Air Shuttle		Bluebird
	Swiss		Icelandair
	Aeroflot		UPS
	Westjet		AirBaltic
	Air Canada		KLM

Maintenance Workshop at main Airports



Maintenance Workshop at main Airports



Professionalism in Providing the Services





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**Mr. Tariq Alghaziri,
Riyad Bank
Head of Wholesales Corporate Banking**



Saudi PPP Market

PPP Landscape of Saudi Arabia

As per the Vision 2030 Program the Kingdom is pursuing PPP model across a number of sectors of the economy

- Historically Power and water projects have dominated the kingdom’s public-private partnership (“PPP”) landscape.
- However, this is changing thanks to the Kingdom’s Vision 2030 economic diversification program.
- Since the launch of the National Centre for Privatization & PPP (“NCP”) and promulgation of the Private Sector Participation (“PSP”) Law, the Kingdom has a planned pipeline of more than 100 upcoming projects spread across various sectors other than Water & Power.

NCP					Aramco	Giga Projects
Ministry Driven Sectors		SWPC		SPPC	Water Treatment	Multi-Utilities
Education	Communications & IT	Water Desalination	Water & Power	Renewable Power	Co Generation	Mixed Used RE
Health	Housing	Waste Water	Water Transmission	Conventional Power	Housing	Hospitality
Transport & Logistics	Tourism	Distribution	Water Storage	T&D	ESG	Entertainment



Pipeline of PPP Projects in Saudi Arabia

Under Implementation	Under Implementation	Pre-feasibility	Under Preparation
Water	Abu Arish 3 ISTP	Health and social services	Health and social services
Jubail IWP phase 4 and 6	North Jeddah 1 ISTP	Al Eman Hospital housing	New Al-Ahsa Hospital
Rabigh IWP phases 4 and 5	Hafar Al Batin 2 ISTP	Medical laboratory services	Two new medical cities
Tabuk IWP	Kharj 3 ISTP	Primary care services	Primary care
Shuqaiq IWP Phase 4	Urban	Extended care	Long-term care
Rayis IWP Phase 2	Municipal asset optimization	Social home care	Elderly care services
Ras Mohaisen IWP	Healthcare	Social case management	Transport
Jizan IWP	Radiology pilot project	Elderly care	Taif International airport
Ras al-Khair IWP Phases 2 and 3	Education	Transport	Defense
Buraidah ISTP Phase 2	Schools wave 1 and wave 2	Public transport services in Mecca/Medina/Jeddah/Dammam	Ministry of Defense housing
Tabuk ISTP Phase 2		4 other transport projects	Agriculture
Madinah ISTP Phase 3		Customs	Veterinary vaccination services
Riyadh East ISTP		Land ports	
Al Haer 2 ISTP		Education	
Khamis Mushait 2ISTP		Schools wave 3	
South Najran ISTP			



PPPs & Riyadh Bank

Riyadh Bank has been one of the most active players in the PPP space of the Kingdom over the years and has significant track record across various sectors

Sector	Participation (SAR MM)
Power	2,591
Giga Projects	7,154
Manufacturing	887
Housing	512
Renewables	2,243
Water	2,851
Water & Power	2,730
Waste Water	762
Total	19,733



Future of Logistics and Transportation Sectors

Transport and logistics sectors are a major focus of the programs of Vision 2030 as the strategy aims to make the kingdom a key tourist destination.

- Four main goals of the strategy are:
 - Transform Saudi Arabia into a logistics hub
 - Boost the quality of life across the country
 - Enhance fiscal sustainability
 - Improve the performance of public entities
- The strategy aims to:
 - Improve air cargo sector capabilities by doubling its capacity to more than 4.5 Million tons
 - Move Saudi Arabia into fifth place globally in terms of number of transit passengers
 - Increase the number of international destinations served by country to more than 250
 - Launch a new national air carrier
- Major projects are planned which will substantially be implemented on PPP basis
- A total of 27 airports



Aviation Sector

Saudi Arabia's Vision 2030 economic development program aims to position the country as an aviation hub

- In 2006 GACA awarded the country's first PPP project in the aviation sector
- In 2011, GACA awarded a 25-year BOT contract worth \$1.4bn
- KSA wants to increase passenger handling capacity to 300 million and is hence considering privatizing
- 22 airports are expected to be turned into holding corporations
- Sub-Sectors Saudi Aviation sector is seeking local and international investments:
 - Airports
 - Freight
 - Catering
 - Maintenance
 - Ground services
- Following airports are currently under the process to be setup as PPPs:
 - Taif International Airport
 - Yanbu Airport
 - Qassim Airport
 - Hail Domestic Airport
 - Riyadh Airport – Terminal 6



Logistics Sector

Logistics is a key factor in Saudi Arabia's economic growth, whether by land, air, or sea, an important part of government policy is based on the logistics of moving goods and people.

- Saudi Arabia's logistics industry has a total value of USD 27.6 billion as of 2021
- KSA has a strategic location which connects to more than 3.5 million potential clients worldwide
- KSA has the most significant marine network in the Middle East consisting of;
 - 21 seaports
 - More than 40 industrial and economic cities
- The container traffic at KSA ports witnessed a CAGR of 7.06% between 2016 and 2020
- Jeddah Islamic Port, the country's largest port, holds more than 75% of the traffic entering Saudi Arabia by sea.
- As part of a port privatization plan, in April 2018 SPA announced 14 PPP investment initiatives:
 - The initiatives are worth \$7.5bn
 - Could create more than 12,000 jobs
 - Generate up to \$11bn in non-oil revenue
- New cargo terminals, re-export zones, and a range of PPPs are among the projects aimed at improving the Saudi port system's performance:
 - Jazan port (multi-purpose terminal)
 - Jeddah Islamic Port (multi-purpose terminal)
 - Jubail Commercial port (multi-purpose terminal)
 - Jadidat Arar Port (ZATCA)
 - Ras al-Khair port (multi-purpose terminal)
 - Yanbu Commercial port (multi-purpose terminal)
 - King Fahd Industrial Ports in Jubail and Yanbu
 - Custom Secured Zones (ZATCA)



Transport Sector

Kingdom's high demand for urban and intercity transportation networks means the size of its planned investments is significant to help achieve the Kingdom its Vision 2030 goals

- As of now a series of metro and light rail projects are planned or underway to alleviate inner-city congestion in Riyadh, Jeddah and Mecca.
- The government strategy had been to complete ongoing megaprojects such as the Riyadh Metro and KAFD before moving on to other projects, however, now with the help of NCP it is planning to move ahead on four key Urban Rail Metro Projects:
 - Makkah Metro
 - Medina Metro
 - Jeddah Metro



THANK YOU

شكراً لكم



بنك الرياض
Riyad Bank



The Saudi momentum in the Airport sector :



**AMBASSADE
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SAOUDITE**

*Liberté
Égalité
Fraternité*



**Abdullah Al-Mogarri,
Riyadh Airport Company,
General Manager of Strategy & Corporate
Affairs**



OVERVIEW ON KING KHALID INTERNATIONAL AIRPORT

January 2023



OVERVIEW ON KING KHALID INTERNATIONAL AIRPORT

AGENDA

01 Introduction about KKIA

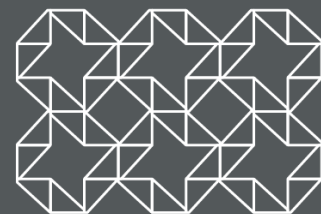
02 Trends and achievements

03 The way forward

04 Potential opportunities

Section 1.0

INTRODUCTION

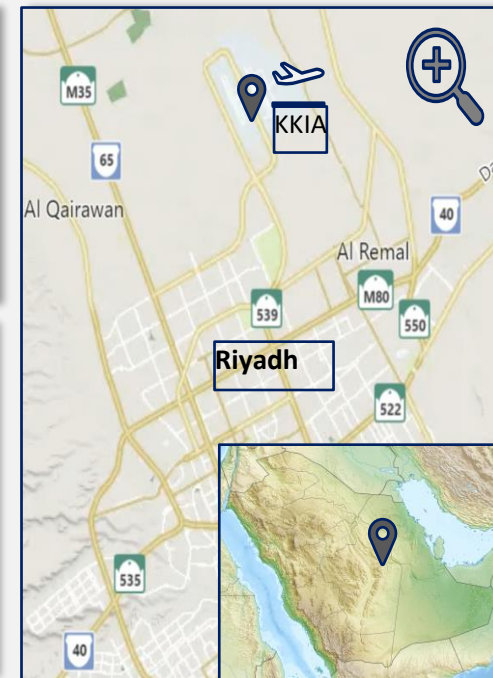


INTRODUCTION

KING KHALID INTERNATIONAL AIRPORT

Establishment

- Opened in 1983
- Designed by HOK
- Constructed by Bechtel
- Terminal 5 was opened in 2016
- Terminal 3&4 was opened in Q4 2022



Operation and Development



1983

2004

2016

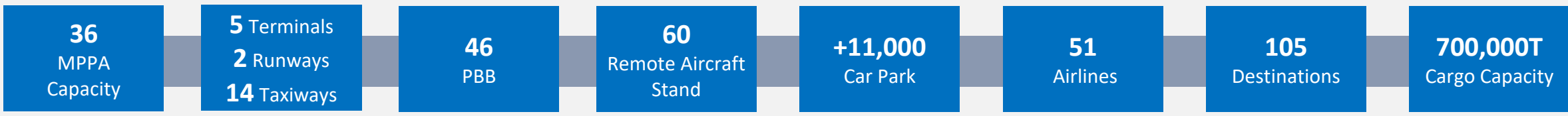
Presidency of Civil Aviation

General Authority of Civil Aviation

Riyadh Airports Company



KEY FIGURES AND FACILITIES



- 1 International Terminals (T1-T4)
- 2 Domestic Terminal (T5)
- 3 Royal Terminal
- 4 Private Aviation Terminal
- 5 Cargo Village
- 6 Integrated Logistics Bonded Zone
- 7 RAC HQ
- 8 Water Supply
- 9 Airport Nursery
- 10 Water Treatment Station

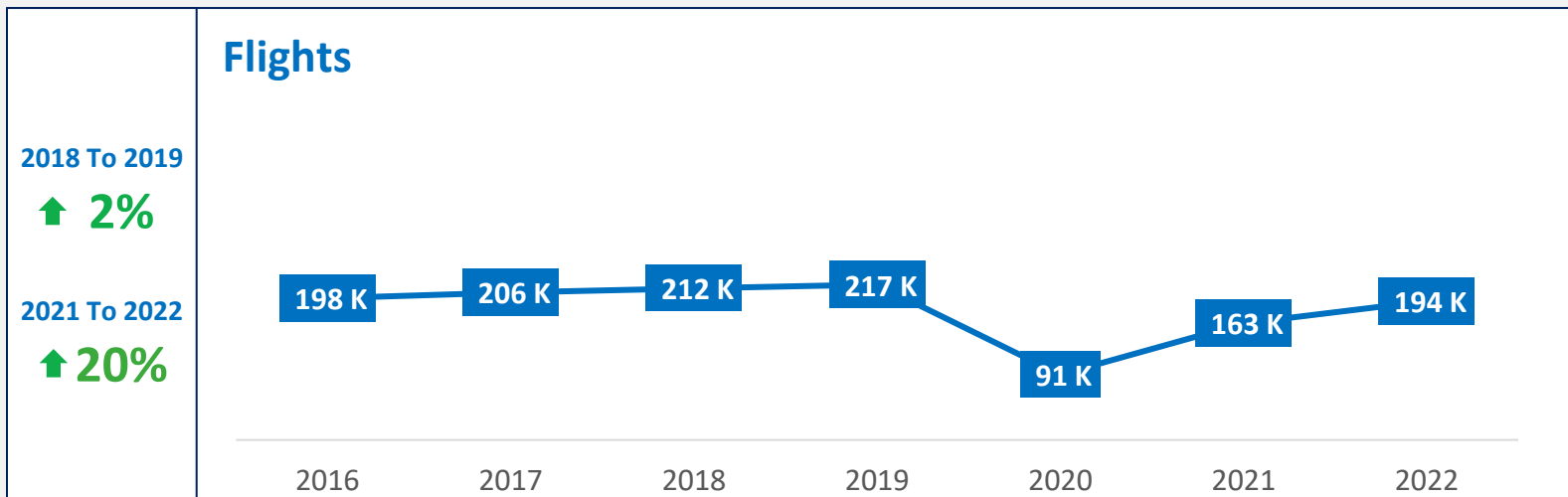
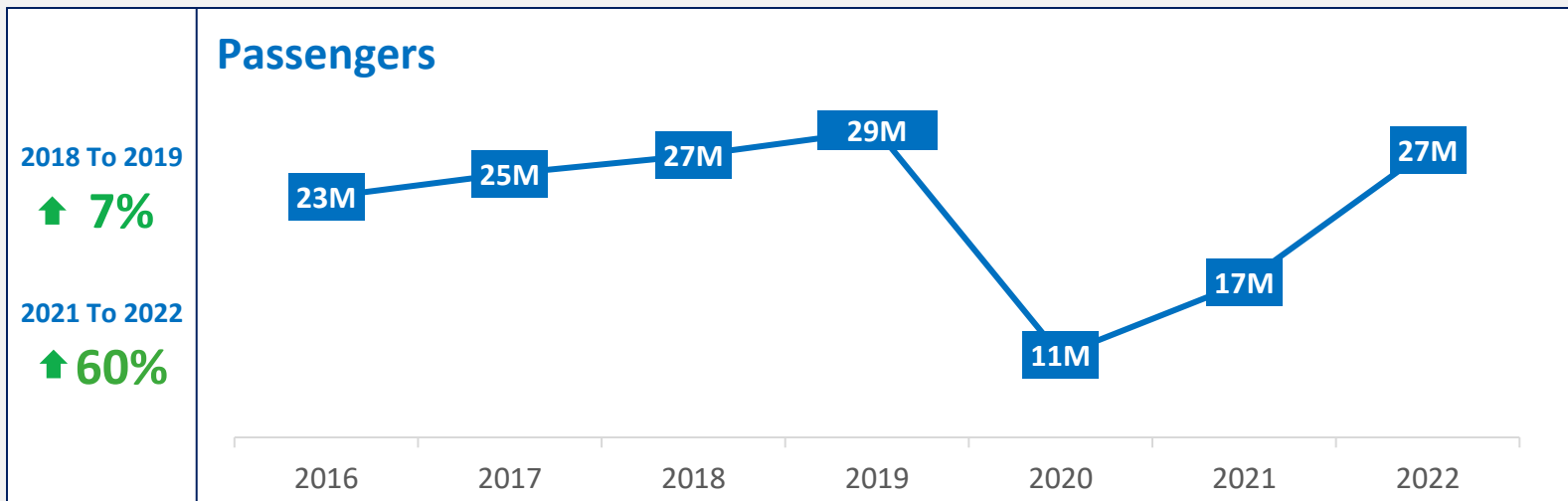
Section 2.0

TRENDS AND ACHIEVEMENTS



TRENDS IN KEY OPERATIONAL FIGURES

PASSENGERS AND FLIGHTS



2022 PERFORMANCE HIGHLIGHTS

Daily Average Number Of
Passengers
73,633 PAX

Daily Peak Number Of
Passengers
99,086 PAX

Daily Average Number Of
Flights
529 Flight

Daily Peak Number Of
Flights
612 Flight

Processed Luggage
18.24 M

Average Queuing Time
Check-in **3:46 Min**
Passport **2.28 Min**

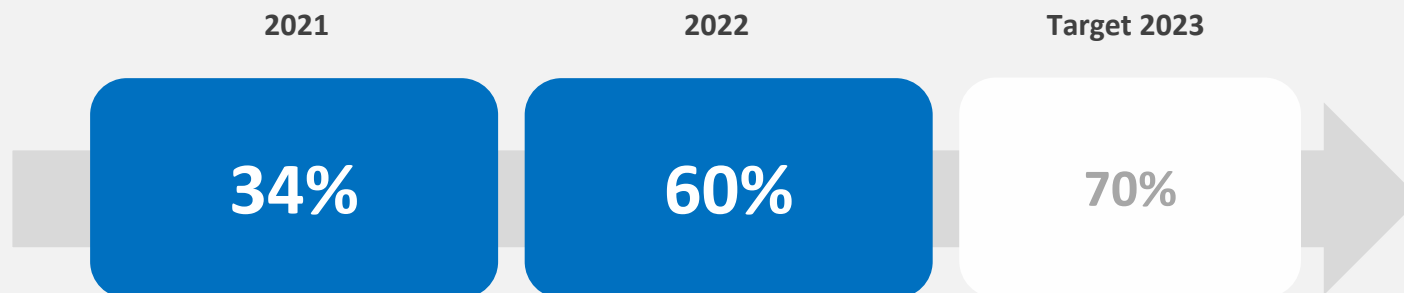
IMPROVEMENTS ACHIEVED IN PAX EXPERIENCE

Top 100 Airports



The "Most Improved Airport" In The World
The 29th Place In Skytrax's 'World Top 100 Airports'

Digital Transformation Index



KEY ACHIEVEMENTS IN 2022

Constructions

- ✓ Completed the construction and ORAT for **T3/T4**
- ✓ Upgraded **Water and Sewage** Network
- ✓ Launched additional **14 check-in** counters in Terminal 2
- ✓ Completion of **Metro Links**
- ✓ Completion of **standby power plant**
- ✓ Completion of **fire and potable water** network rehabilitation project

Technology

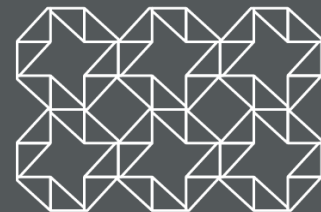
- ✓ Launched the **Airport Operation Control Center (AOCC)**.
- ✓ Launched the digital **platform for airport operations management**
- ✓ Improved RAC **Cybersecurity maturity** level
- ✓ Automated the billing procedures by applying the **E-Invoicing program** for business partners
- ✓ Launched a service via What's App and Twitter to provide flight notification service in **sign language as the first airport** in the world providing such service

Others

- ✓ Development of **RAC strategy** 2022-2026
- ✓ Development of **short-term expansion plan** for KKIA
- ✓ Achieved an award from Skytrax for **Most Improved Airport** in the world
- ✓ Won **King Salman International Award for Disability Research** in the category of Universal Access from the King Salman Center for Disability Research (KSCDR)
- ✓ Achieved level 2 certificate from the Airports Council International (ACI) for **carbon emission**
- ✓ Signed 22 new **commercial contracts** and renewal of 144 commercial contracts
- ✓ Opened **new 26 outlet** inside terminals
- ✓ Launched **31 new destinations and air services**
- ✓ Internalized the operations of T1-T3 **car parking**
- ✓ Achieved Certification in **ISO 45001** (Occupational Health and Safety Management System), **ISO 22000** (Food Safety Management System) and **ISO 14001** (Environmental Management System) for meeting the ISO standards
- ✓ Successfully mobilized the new **O&M contractors** after the conversion to facilities management contracts

Section 3.0

THE WAY FORWARD



RAC's STRATEGY

2022 – 2026



2026 TARGETS



Digital passenger experience



Efficient-Cost
Efficient-Operations



Ecosystem of partners to enable business



Growth-enabled organization

Top 20

Skytrax Ranking

4.85

ASQ Score

100%

Digital Transformation Index

90%

On-Time-Performance

60 min

MCT Int – Int (Minimum connection time)

15 min

First Baggage Delivery Time

>120

International Destinations

>50

Number of Freighter Destinations

Neutrality

Airport Carbon Emission

100%

Formalized Processes

100%

Automated Processes

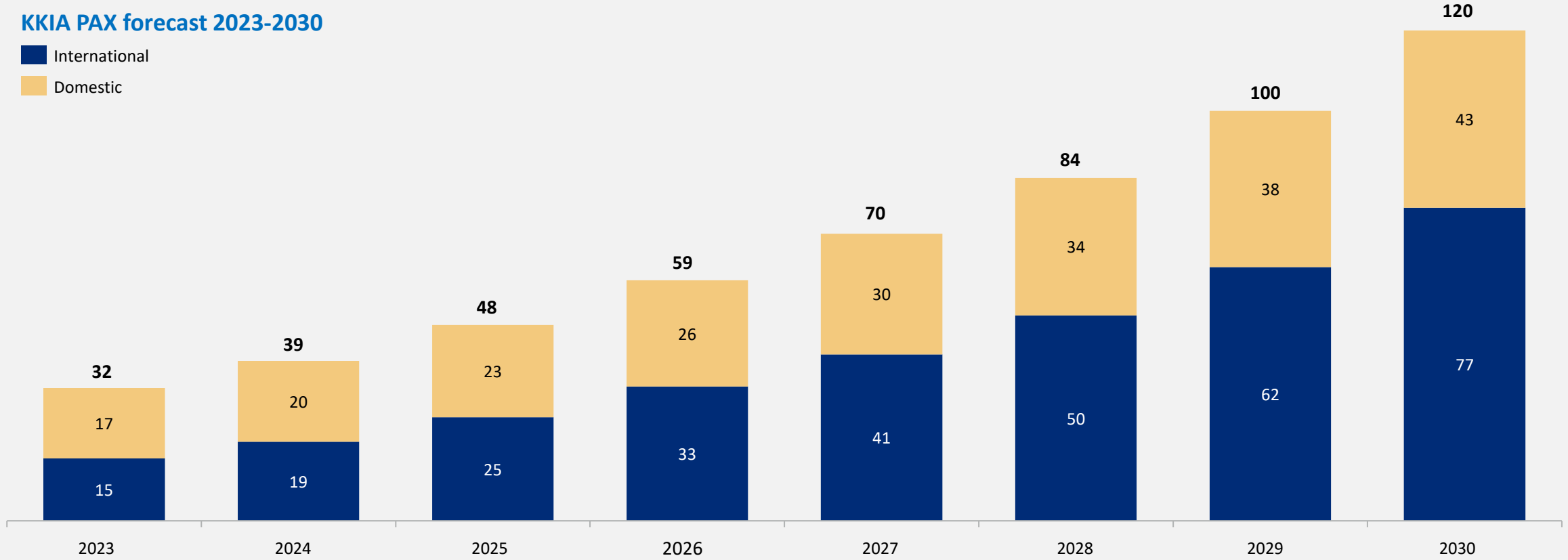
>4.0

Cybersecurity Maturity Index

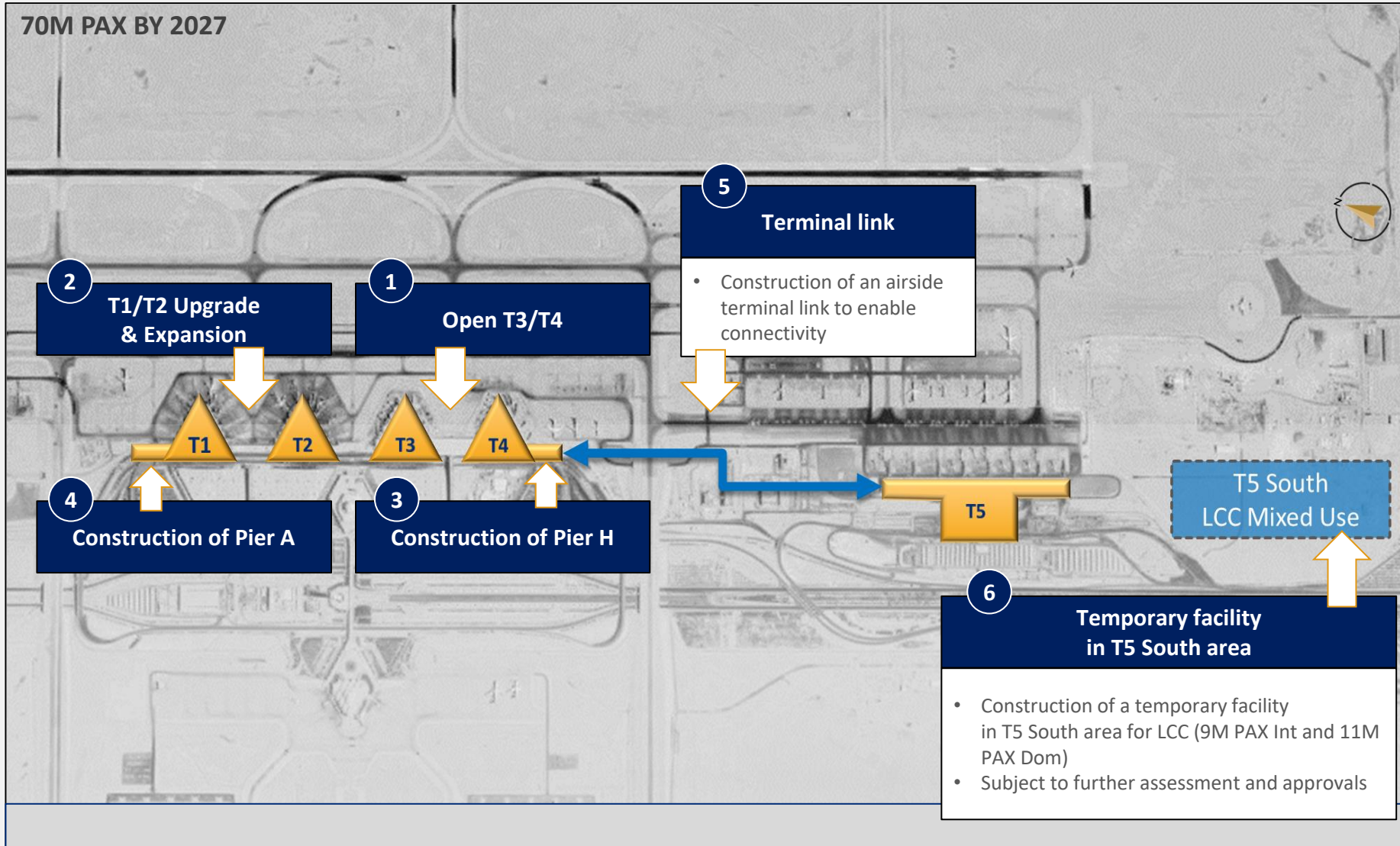
TRAFFIC FORECAST

KKIA PAX forecast 2023-2030

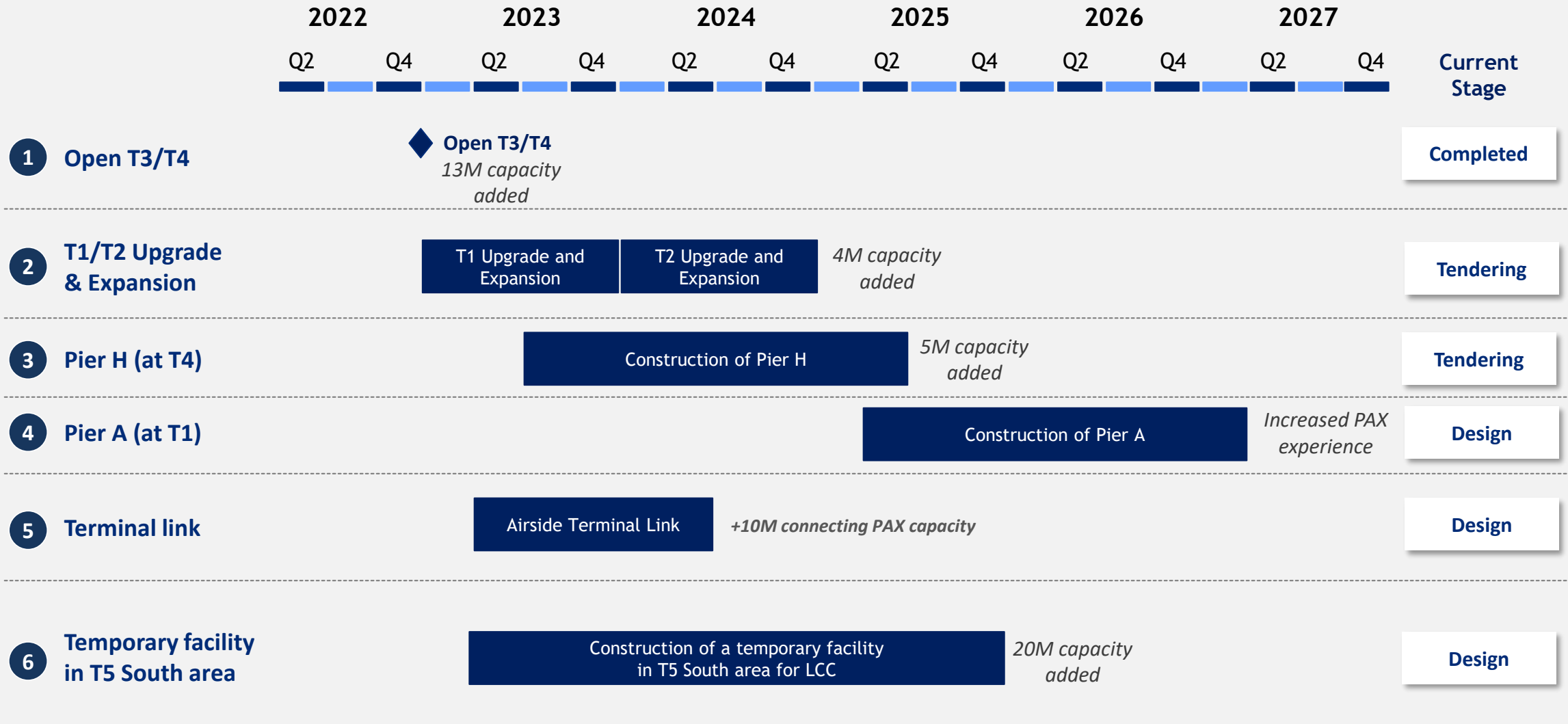
- International
- Domestic



SHORT TERM EXPANSION PLAN



SHORT TERM EXPANSION PLAN – TIMELINE



TARGETED TRAFFIC ALLOCATION

Traffic allocation by 2026/2027

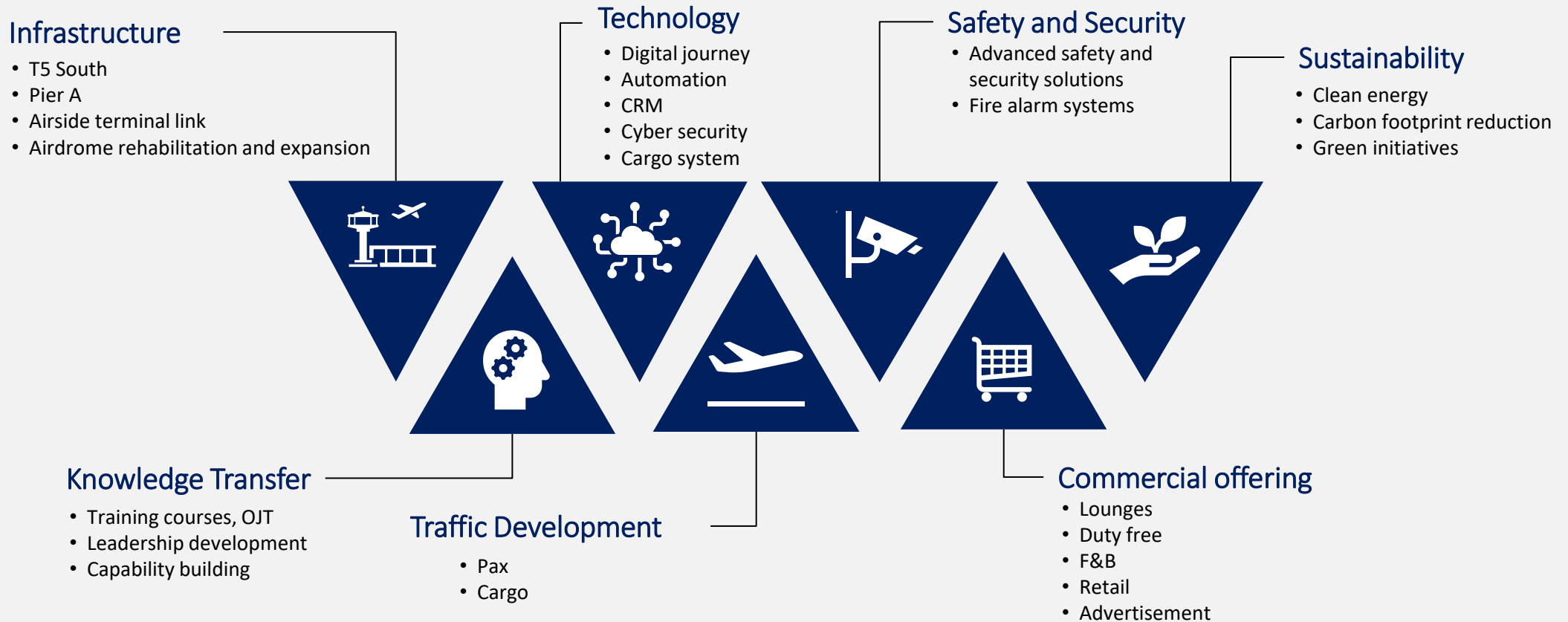


Section 4.0

POTENTIAL OPPORTUNITIES



AREAS FOR POTENTIAL OPPORTUNITIES





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SAOUDITE**

*Liberté
Égalité
Fraternité*



Ayman Abo Abah
Jeddah's King Abdulaziz International Airport
(JEDCO),
Chief Executive Officer

jedco Jeddah
Airports

JEDCO Strategic Partnership



matarat

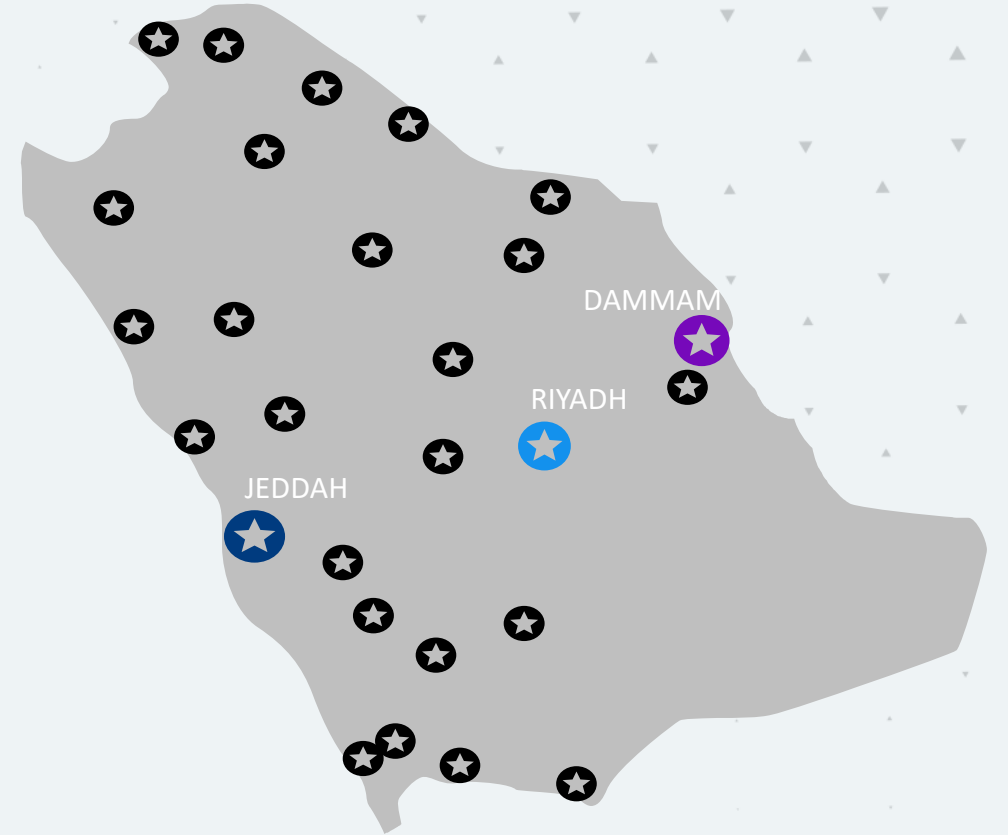
Holding

مطارات الرياض
riyadh airports

jedco Jeddah
Airports

DACO
شركة مطارات الدمام
Dammam Airports Company

Cluster²
تجمع مطارات الثاني



JEDCO's Vision



To be a best-in-class global aviation and logistics hub operator, revolutionizing airport experience & serving as a gateway to the Holy Mosques, while enabling tourism & international trade

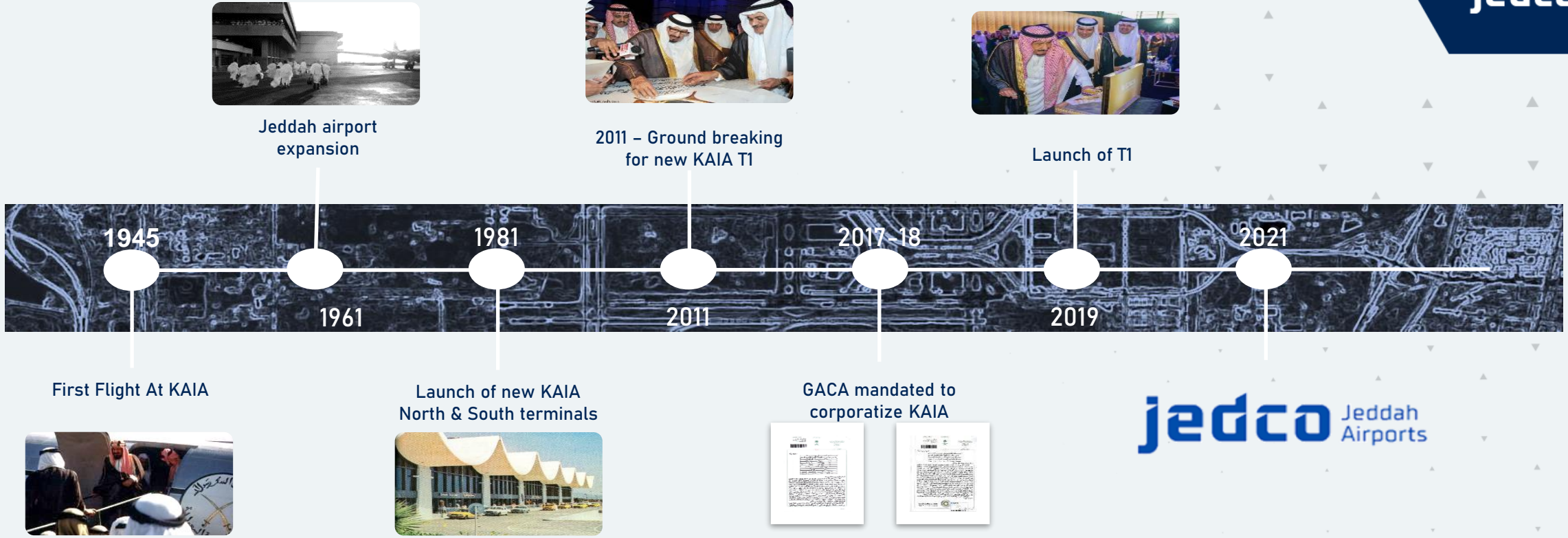


JEDCO's Mission



To offer seamless airport experiences, drive growth, operate a financially and environmentally sustainable airport as well as foster talent and innovation within the aviation ecosystem










Our Heritage!

The National Aviation Strategy has set targets for Jeddah Airport spanning across traffic, connectivity and revenue performance

Relevant 2030 Targets for Jeddah Airport

	 Total Passenger Traffic	 Total Transit Traffic	 Total Destinations Served	 Total Tonnage of Cargo Processed	 Non-Aero¹ Revenue Share (KSA wide)
2030 Target	330 MN	30 MN	250+	4.5 MN	45%
JEDCO	114 MN	15 MN	150+	2.5 MN	45%

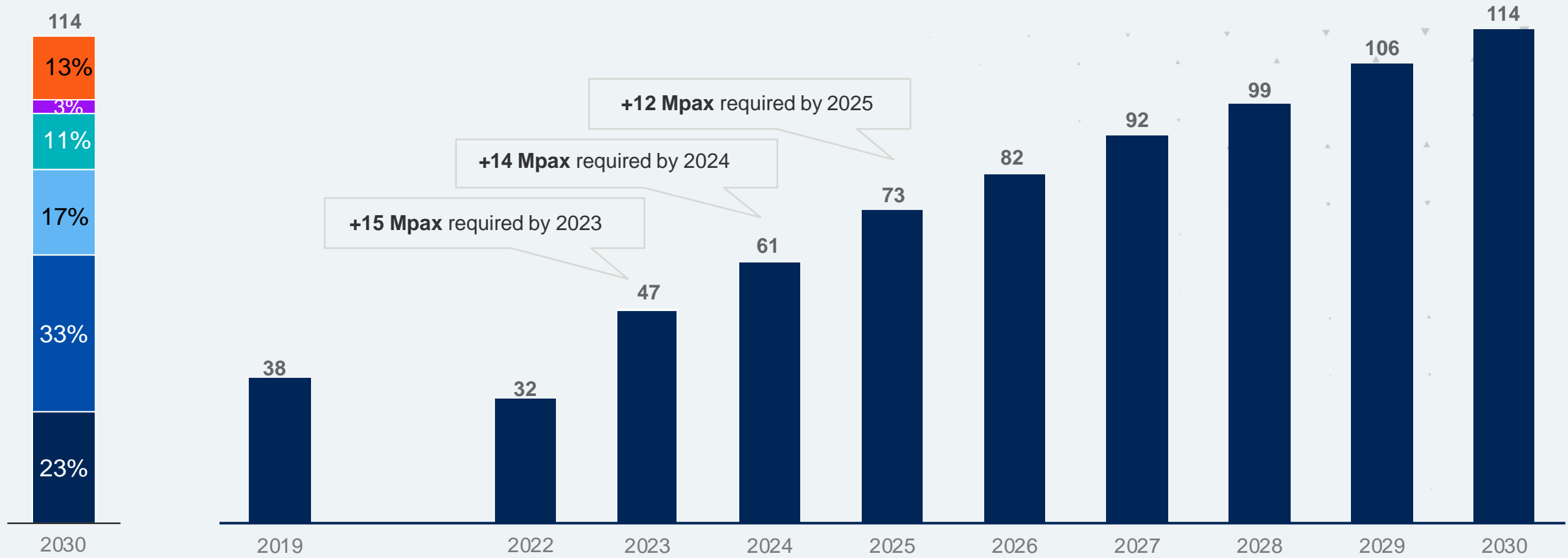
Breakdown of National Aviation Strategy's target of 114 Mpax for KAIA

Air Traffic Profiles Percentages

- Leisure
- Hajj & Umrah
- VFR
- MICE
- Others
- Transit

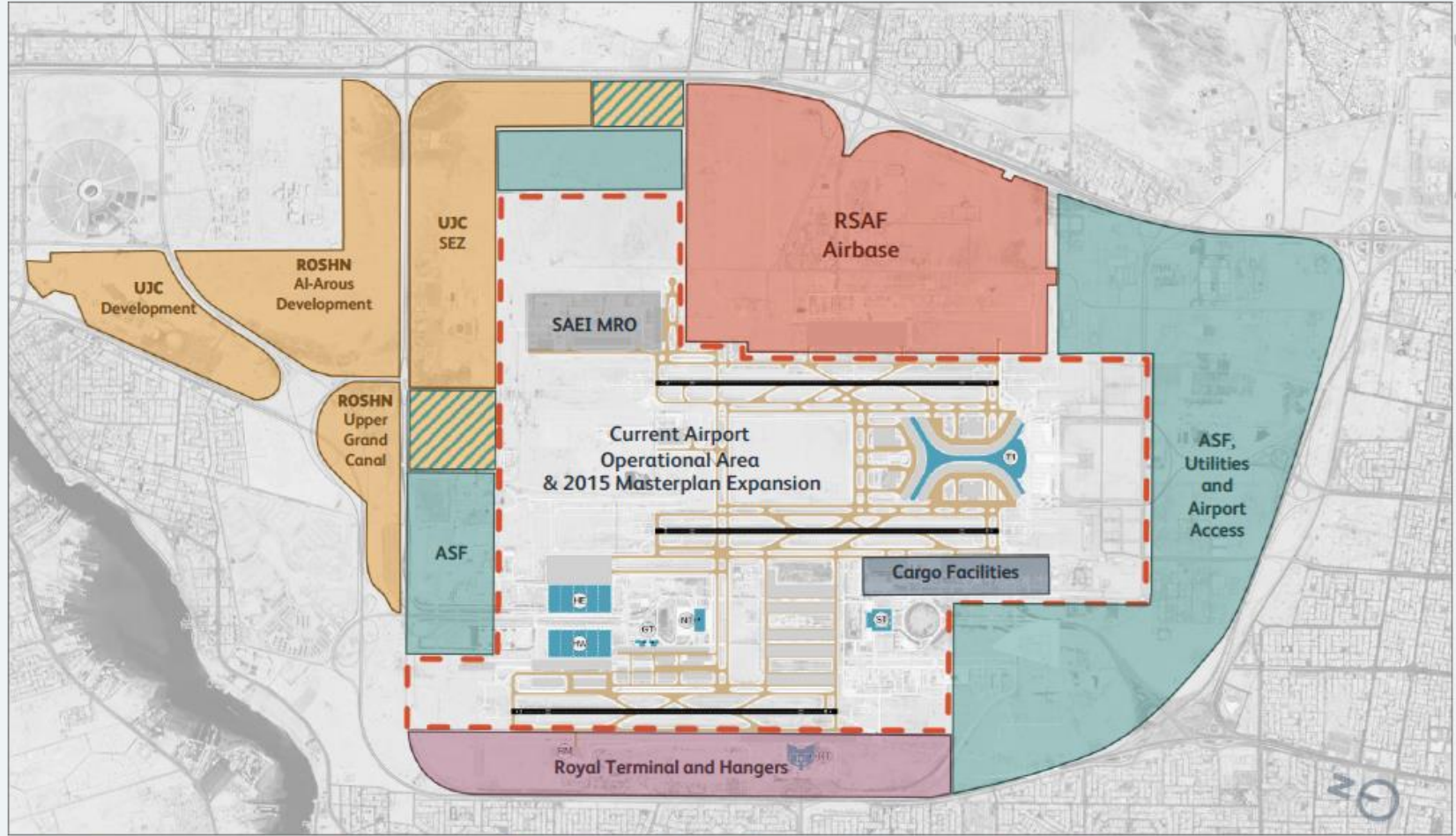
KAIA Passenger Air Traffic Forecast

(Mpax, 2019-2030)




KAIA Today has multiple operational and non-operational land uses

-  Land in operational use and designated for expansion in the 2015 / 90 MAP Airport Masterplan.
-  Extreme landside areas currently used for Airport access & a mix of utilities, ASF & commercial development
-  Airport-adjacent Land allocated to developers for complementary projects
-  Land to the East is occupied by the RSAF Airbase
-  Land primarily dedicated to use for the Royal Terminal and Royal Hangars
-  Existing Cargo Facilities



 **71** 16 main
55 sub
Taxiways

 **4**
Terminals

 **3**
Runways

 **88km²**
Land Area

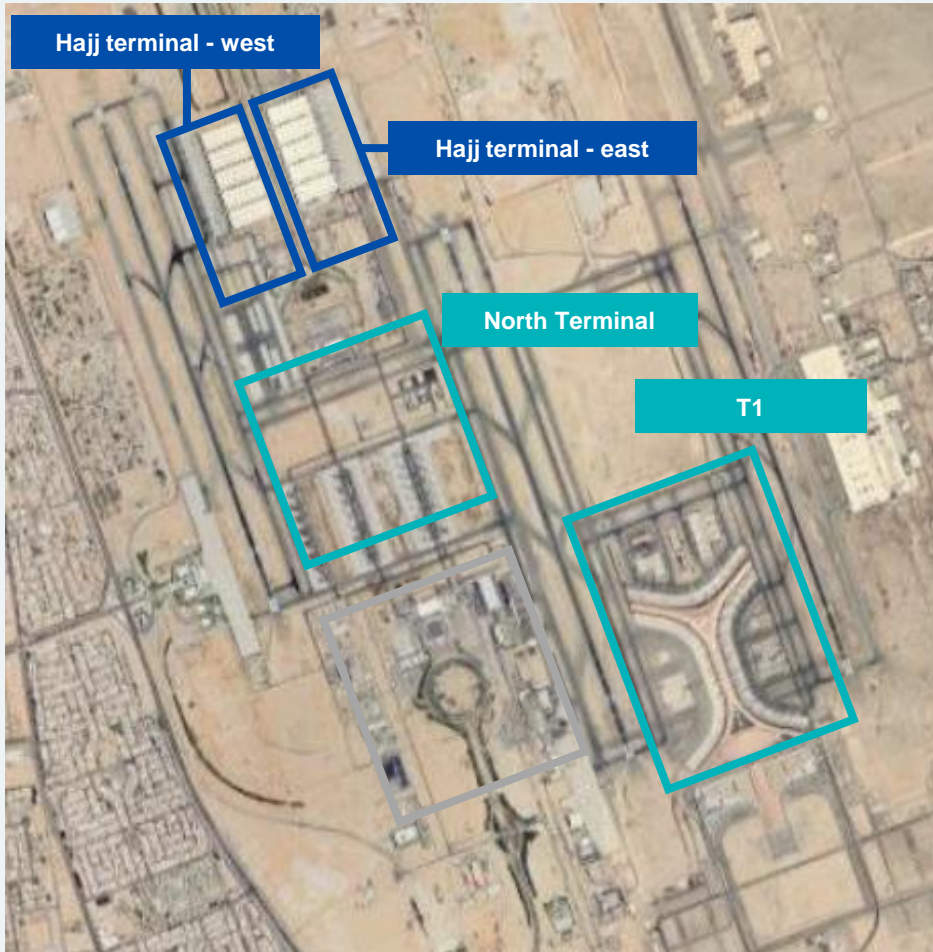
 **1.375m**
m² GFA
Terminals

 **0.7MT**
Cargo capacity

 **50MAP**
capacity

KAIA has a uniqueness compared to all airports worldwide, with two significantly different passenger journeys in its terminals

KAIA airport map and key passenger journeys



Source: JEDCO discussions, Oliver Wyman analysis

Terminal	Capacity (Mn Pax)	Traffic type
Terminal 1	35 Mn Pax	Domestic, international and transit – regular passengers
North Terminal	6 Mn Pax	International – regular passengers
South Terminal	Unused / Under rehabilitation	
Hajj Terminal	9 Mn Pax (Hajj , Umrah and Group)	International pilgrims

Our Terminals

Terminal 1

35,000,000 Pax / Year
 810,000 m2 Terminal Area
 46 Gates
 Contact Stands 70 Aircrafts
 Remote Stands 28 Aircrafts
 220 Check-In Counters
 128 Immigration Counters
 120 Hotel Rooms
 8,209 Passenger Cars Parking
 4,344 Long Term Cars Parking
 81 Prayer Rooms
 6 Railway Tracks
 2 APM Lines
 3 APM Carts
 APM Journey 45 Seconds
 Railway Station Area 12,000 m2
 7 VIP lounge
 322 Facilities
 60 Security Screening Lanes

Hajj Terminal

9,000,000 Hajj Pax/Year
 90,000 m2 Terminal Area
 18 Gates
 Contact Stands 10 Aircrafts
 Remote Stands 10 Aircrafts
 166 Check-In Counters
 222 Immigration Counters
 123 Rooms
 46 Prayer Areas
 140,000 m2
 2 VIP lounge
 56 Facilities
 16 Security Screening Lanes

North Terminal

6,000,000 Pax / Year
 55,676 m2 Terminal Area
 8 Gates
 Remote Stands 49 Aircrafts
 57 Check-In Counters
 32 Immigration Counters
 1,392 Passenger Cars Parking
 3 Prayer Areas
 1 VIP lounge
 37 Facilities
 6 Security Screening Lanes

South Terminal

10,000,000 PAX/year
 93,481 m2 Terminal Area
 12 Gates
 Remote Stands 49 Aircrafts
 56 Check-In Counters
 58 Immigration Counters
 120 Hotel Rooms
 1831 Passenger Cars Parking
 8 Prayer Areas
 2 VIP lounge
 36 Facilities
 10 Security Screening Lanes

Future Ambitious Masterplan



Passengers Potential Demand Paris ↔ Jeddah

Passenger demand Paris ↔ Jeddah

	JED-CDG	CDG-JED	Total
O&D Demand	51,512	34,467	85,979
Direct	32,437	23,237	55,674
Indirect	19,075	11,230	30,305
Beyond JED	326,662		326,662
Behind CDG	633,170		633,170
Total Demand			1,045,811

Top 10 Behind Paris Markets

	Airport	Pax
1.	DXB	241,522
2.	BKK	113,823
3.	RUH	47,659
4.	BOM	34,989
5.	CGK	29,745
6.	KUL	27,639
7.	ISB	23,939
8.	DAC	21,005
9.	MCT	19,906
10	NBO	18,759
.		

Top 10 Beyond Jeddah Markets

	Airport	Pax
1.	LHR	89,957
2.	CMN	72,897
3.	JFK	26,468
4.	FRA	18,441
5.	MAN	17,481
6.	GVA	13,068
7.	MPX	11,634
8.	AMS	11,505
9.	MAD	9,014
10	MUC	8,152
.		

- Saudia flying circa is **130K**
- Potential Passenger volume is **915K**
- **AirFrance could capture 14% (128K) from the potential remaining share**

**Subject to an effective codeshare with Saudia*

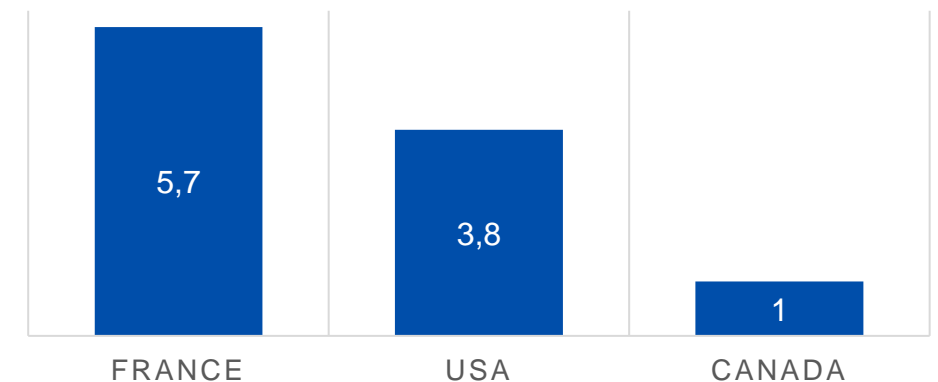
Muslim population Demand

- The Muslim population of France is estimated at approximately **5.7M**, and the North American (US & Canada) Muslim population at **4.8M**
- Assuming Western Muslims visit Mecca for Hajj or Umrah once every 30 years with the easing of travel restrictions to Saudi Arabia:
 - 3.33% of French & N.A. based Muslims will travel to Mecca every year
- This translates to a overall potential traffic volume accessible via CDG of c. **700k** one-way passengers per year
- Assuming an AirFrance **capture rate of 20%**, they would capture **140K** religious passengers per year
- This alone will fill **86% of capacity on a daily A330-200** service

AIRFRANCE

DELTA

MUSLIM POPULATION (M PEOPLE)



JEDCO's airport experience value proposition

Differentiators

**Proximity to
Africa/Europe/Asia/
Southern Region
and coast of the
Red Sea**

**Be the global gateway
for Hajj & Umrah and
Islamic Holy sites**

**Be a local and
cultural heritage
identity promoter**

**Be a gateway for
international and
local festivals and
Upcoming KSA
Tourism Hotspots**

Value prop.
Pre-requisites

**Implement a
seamless
passenger
journey**

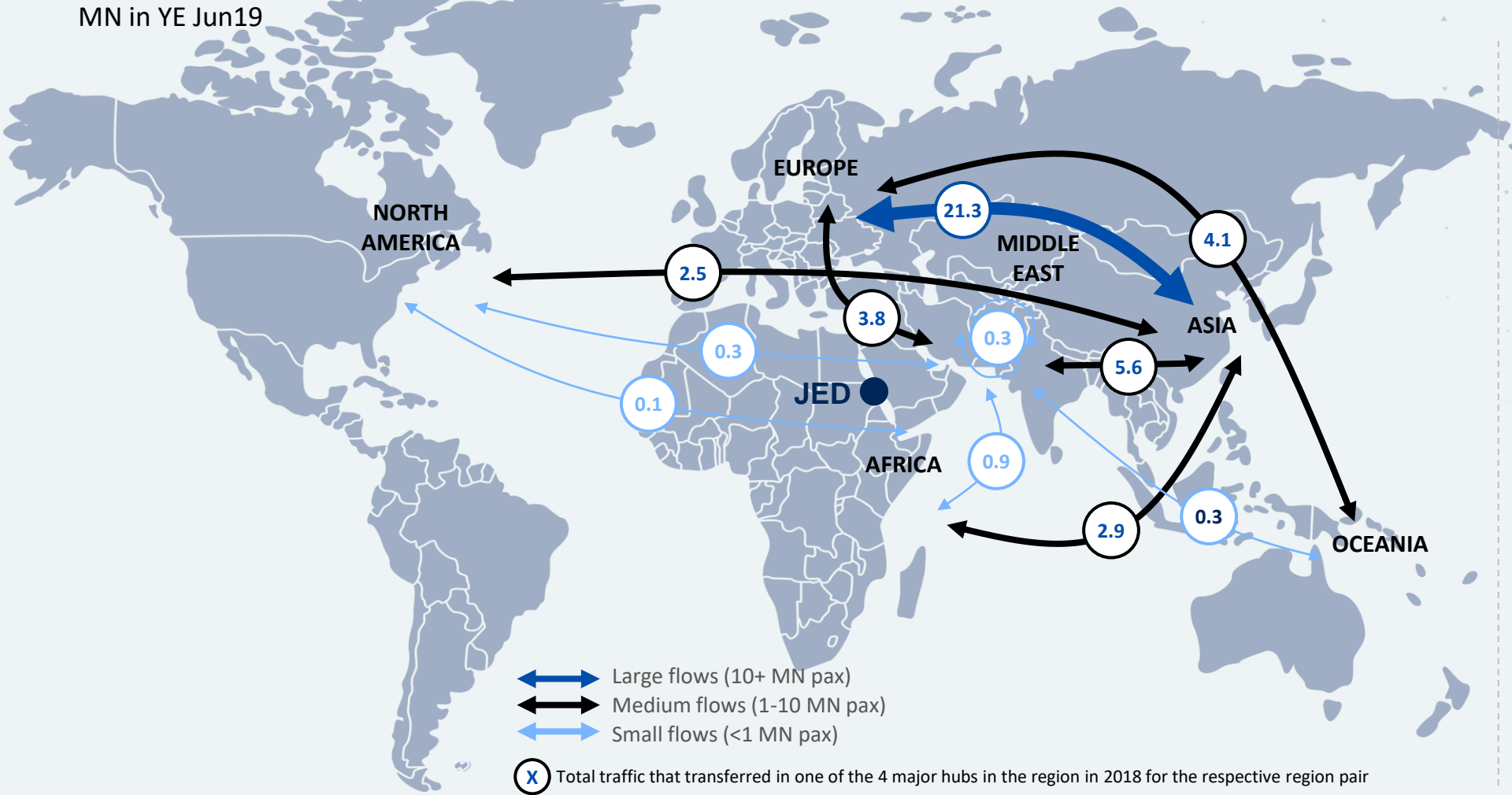
**Ensure a
technologically
and digitally
enhanced journey**

**Provide a
personalized
airport
experience**

**Provide a world-
class and
memorable
experience**

Middle East is attractively located to cater to Europe-Asia, Europe-Oceania, Asia-North America and Asia-Africa flows

Global connecting traffic flows transferring through major hubs in the region
MN in YE Jun19



Consideration set for Middle East

- EUROPE – ASIA
- EUROPE – OCEANIA
- EUROPE – AFRICA
- ASIA – AFRICA
- ASIA – NORTH AMERICA

As of April 2022, JED was served by 100+ carrier from 3 different regions

Origin of foreign airlines serving Jeddah Airport April 2022

North America

No carriers serving Jeddah

Europe

No carriers serving Jeddah

Asia

12 Carriers

Middle East
18 Carriers

Africa
13 Carriers

Pacific

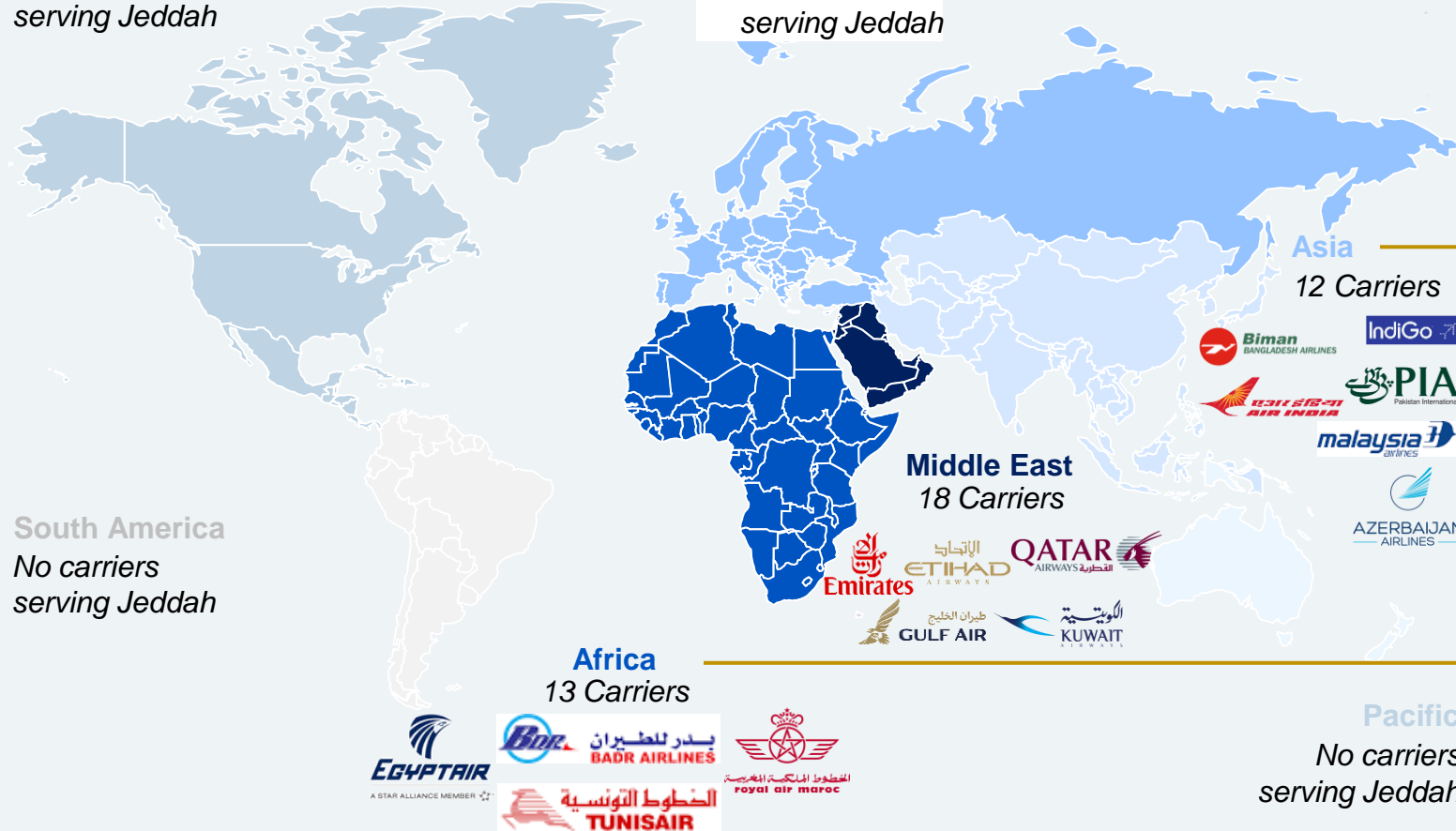
No carriers serving Jeddah

Airlines that no longer serve Jeddah Compared to 2019YE, by region



South America

No carriers serving Jeddah

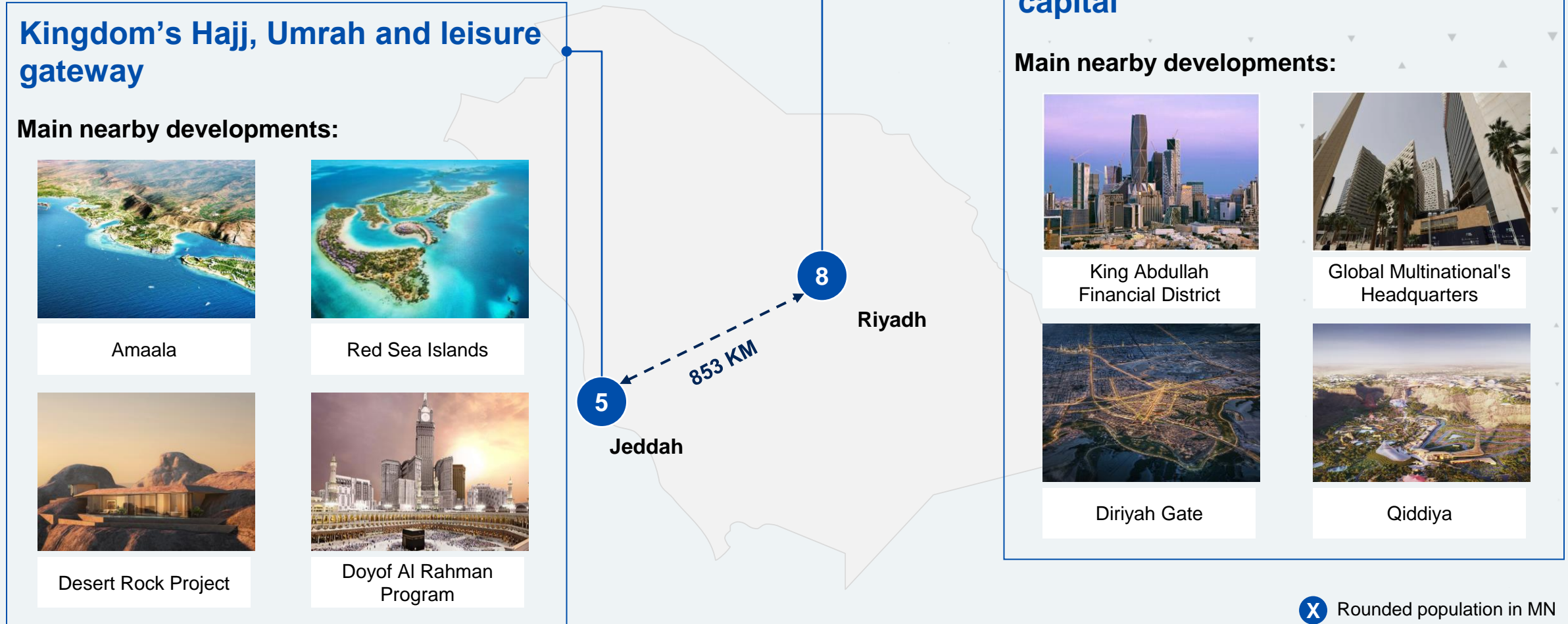


Note: Considering airlines with at least 1 flight/week; Source: Oliver Wyman analysis, Planestats.com

Jeddah will be the main Hajj, Umrah and leisure gateway, while Riyadh will be established as the Kingdom's financial and political capital

Non-exhaustive

Riyadh and Jeddah value proposition

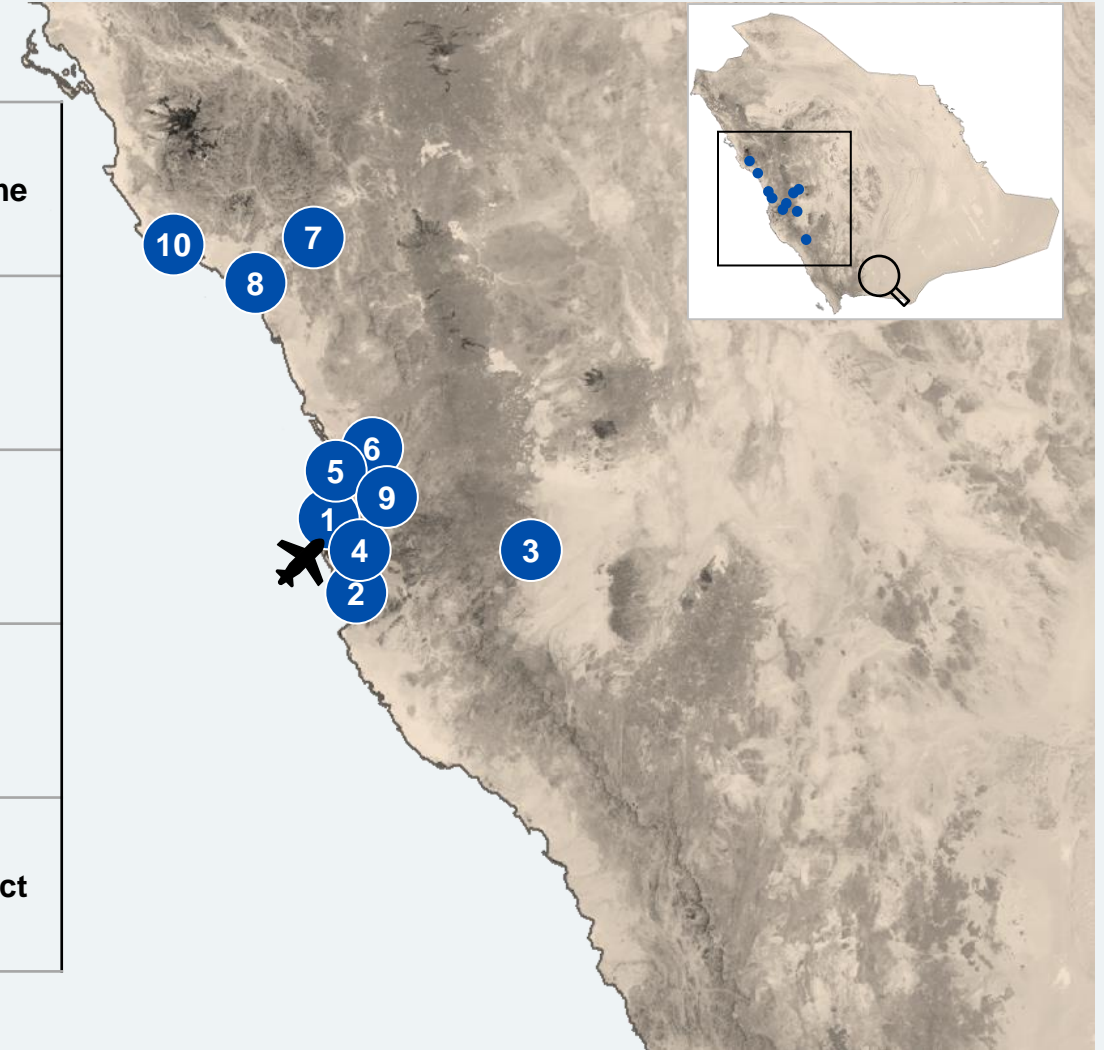


X Rounded population in MN

Jeddah airport will be the gateway for some of the key touristic developments of KSA, according to the National Tourism Strategy,

Main touristic developments to be served by Jeddah Airport

	1	Beaches & Water activities hotspots		6	Jeddah Super Dome
	2	Jeddah Historic Town		7	Al Ula
	3	Al Hada & Al Shafa		8	Harrat Rahat
	4	RED SEA International Film Festival		9	Jeddah Entertainment Season
	5	Formula-1 Saudi Arabian Grand Prix		10	The Red Sea Project





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DE FRANCE
EN ARABIE
SAOUDITE**

*Liberté
Égalité
Fraternité*



**Mohammed A. Alhassany,
Dammam Airports Company (DACO),
Chief Executive Officer**



Airport Future Business Development

Mohammed A. Alhassany
Chief Executive Officer
DACO Dammam Airports Company





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Fraternité*



**Mr. Ali Masrahi,
Cluster 2,
Chief Executive Officer**

Cluster 2
تجمع مطارات الثاني

French-Saudi Strategic Partnership for Designing the Airports of Tomorrow

2030 Vision in Airports Sector



● Introduction

Cluster2 Airports company has been established as an L.L.C on January 1st in 2022. The company supervise, manage, and monitor the operations at the 22 airports.

Cluster2 seeks to continuously develop the airports infrastructure and services, and to operate all airport facilities efficiently and safely.

Other responsibilities are:

- Managing **investible and commercial** relations.
- Developing and operating **cargo facilities**.
- Improving operational **efficiency** and **productivity** to keep pace with air transportation industry.
- **Monitoring** the performance of all the Airports and the passengers Services, accurately and constantly.
- Enforcing the **commercial** and the **investible** growth opportunities.
- Providing a **healthy environment** for our employees and stakeholders.
- **Enabling tourism** through improving the level of service provided to

● Our Priorities

In order to achieve the **National Aviation Strategy** in **2030 Vision** , we have set our priorities as follows:



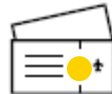
Optimize and grow the current network to **increase aeronautical revenue**



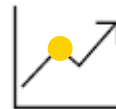
Develop the targeted offering to **unlock non-aeronautical revenue opportunities**



Efficient airport operations to enhance profitability



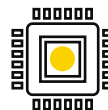
Enhance **passenger experience**



Expand Capacity in-line with demand



Modernize airport infrastructure to achieve **long-term cost savings**



Setup **digitalization solutions** and install appropriate IT infrastructure

● Our Objective

To Serve ~41 million passengers annually by 2030 with unique

passenger journey
Ongoing Mega Projects

- **New Jazan Airport.**
- **New terminal at Al-Jouf International Airport.**
- **An additional terminal in Prince Naif bin Abdulaziz International Airport in Al-Qassim.**
- **New Terminal in King Saud Airport in Al-Baha.**

● Our Airports

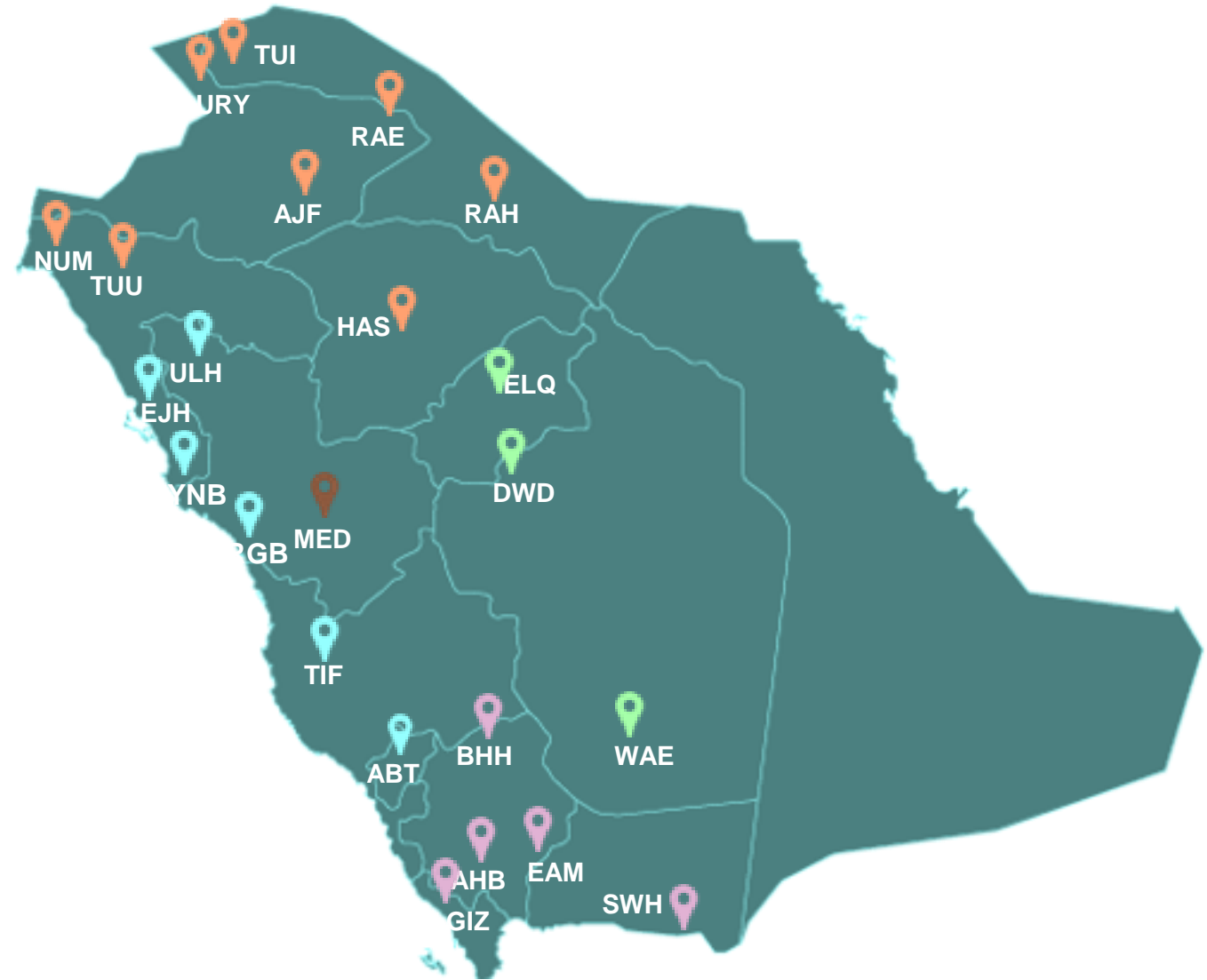


Cluster 2 operates, and monitors the performance of **22** airports in addition to overseeing the performance of Prince Mohammed Bin Abdulaziz International Airport in Medina to ensure the airports' operational activities are performed efficiently and accurately while maintaining the international and domestic regulations and standards.

● Our Airports

The airports are clustered into 4 groups:

- Northern Airports (8 airports)
- Southern Airports (5 airports)
- Western Airports (6 airports)
- Central Airports (3 airports)



Cluster 2

تجمع مطارات الثاني

Thank you



**Mega-projects,
a major opportunity
to achieve the
Airport ambitions of
The Vision 2030**

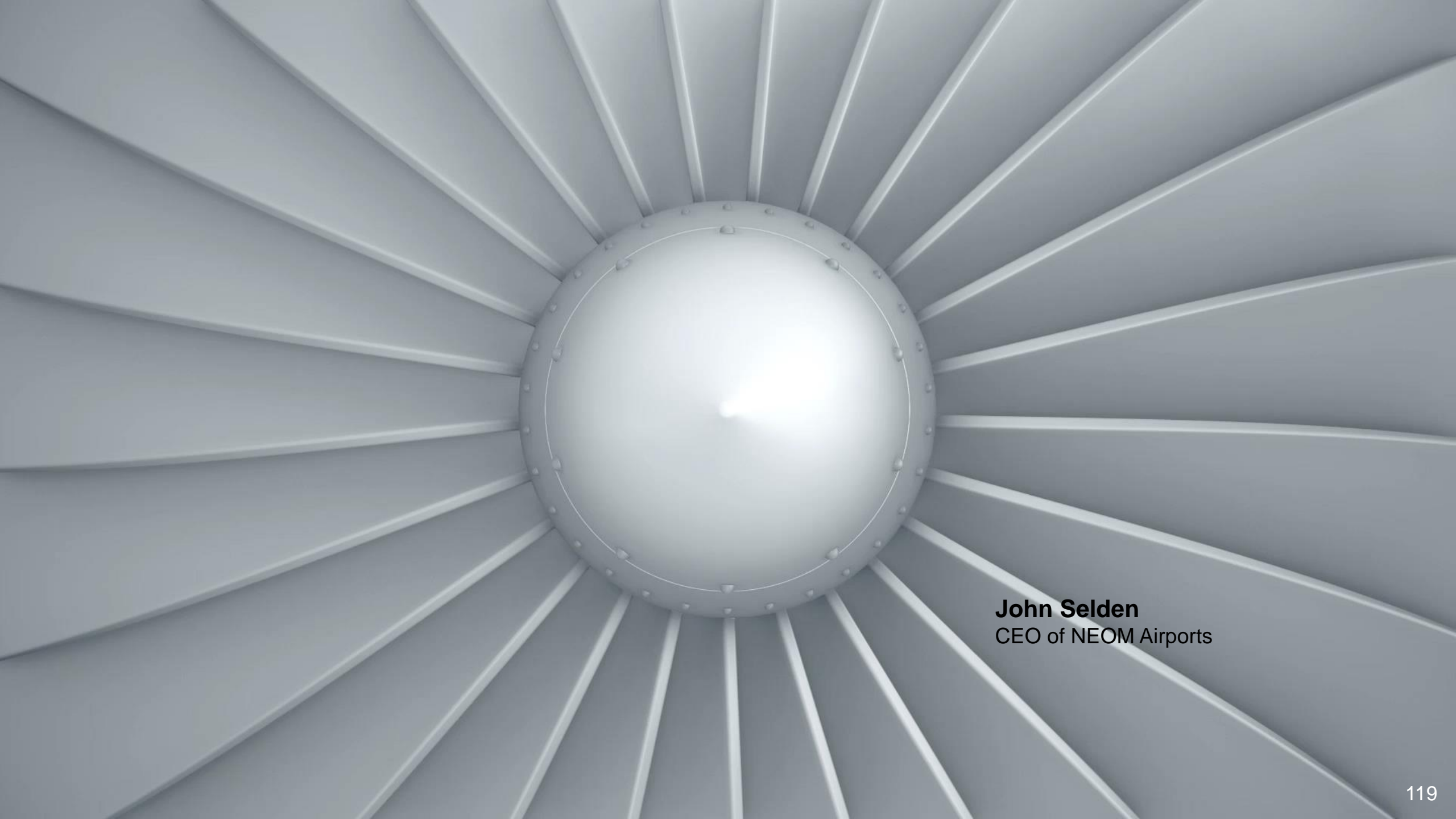


**AMBASSADE
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EN ARABIE
SAOUDITE**

*Liberté
Égalité
Fraternité*



**John Selden,
Neom,
Chief Executive Officer - Airports**

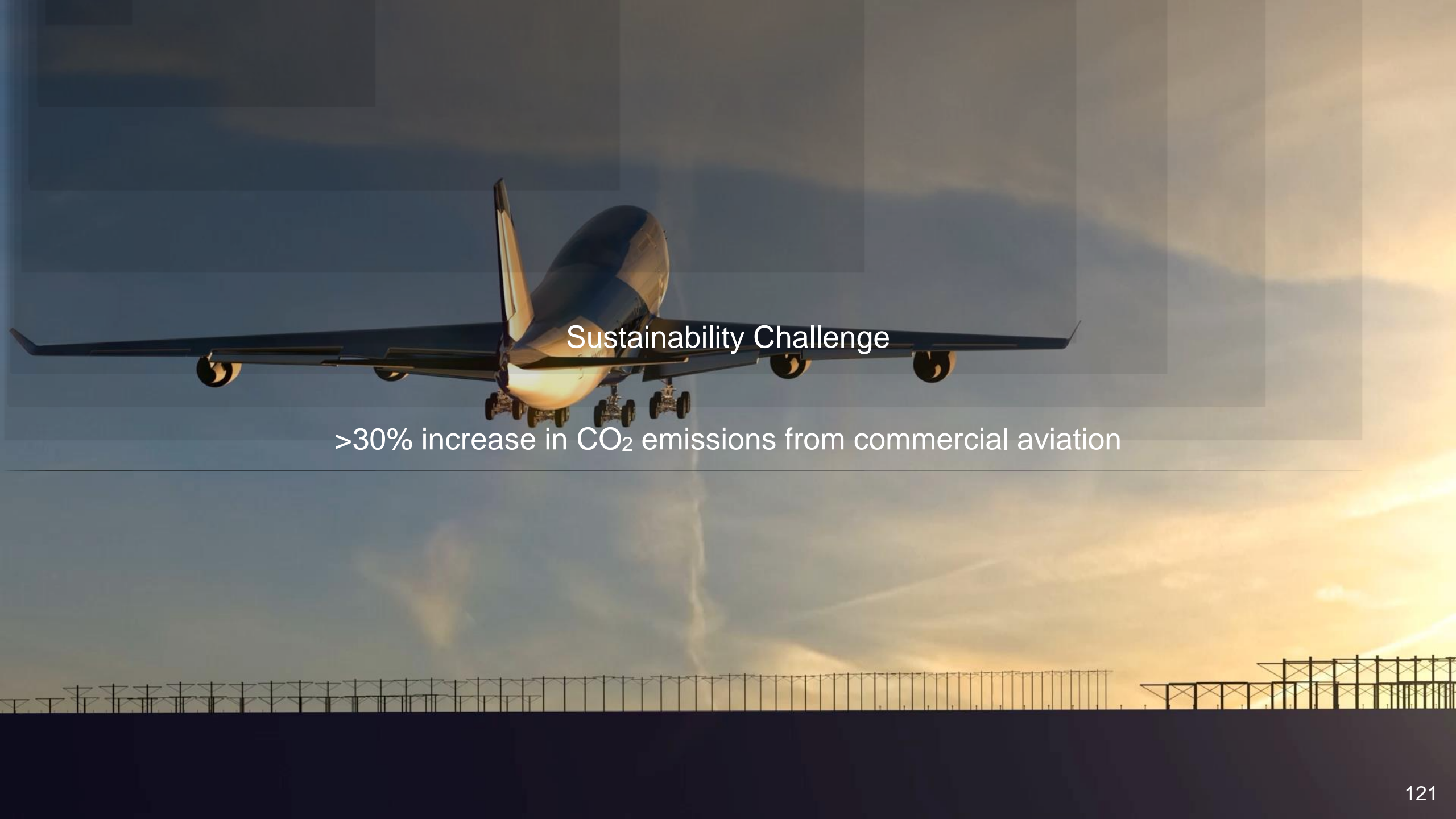


John Selden
CEO of NEOM Airports



Global Challenges

The aviation sector hasn't delivered on Sustainability, Digitization,
and Passenger Experience.



Sustainability Challenge

>30% increase in CO₂ emissions from commercial aviation



Digitization Challenge

Air transport is ranked at the bottom 50% of the most digitized sectors

A photograph of an airport terminal interior. The scene is dimly lit, with the primary light source being a large window that looks out onto an airfield. The window is divided into a grid of panes. Outside, several commercial aircraft are visible on the tarmac, along with airport buildings and a clear sky. In the foreground, the silhouettes of numerous people are visible, some sitting in rows of airport-style chairs, others standing. The overall atmosphere is one of quiet waiting. The text is overlaid in white on the central part of the image.

Passenger Experience Challenge

>9 billion hours spent globally by airline passengers waiting at airports



How to transform the challenges into opportunities for NEOM?



NEOM AIRPORT & AIRLINE UNIFIED VISION

*Creating a sustainable future of aviation
that makes dreams fly*

**NEOM Airlines
will provide
direct service
from around the
world to NEOM**





Spacious and smart-designed cabins with sustainable products

AI-enabled operations control center
enhancing efficiency and On-Time-Performance

Predictive Maintenance powered by IoT
to enhance efficiency

Electric and Hydrogen powered aircraft when available;
Biofuels (resulting from waste management) and Synthetic Kerosene based on green hydrogen

NEOM AIRLINES

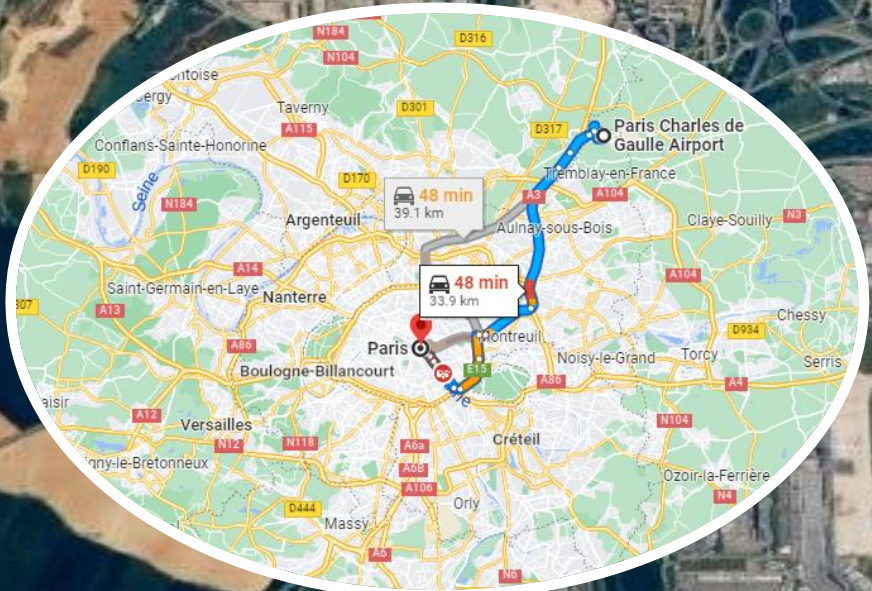
Joint development of a completely aligned transportation product...

&

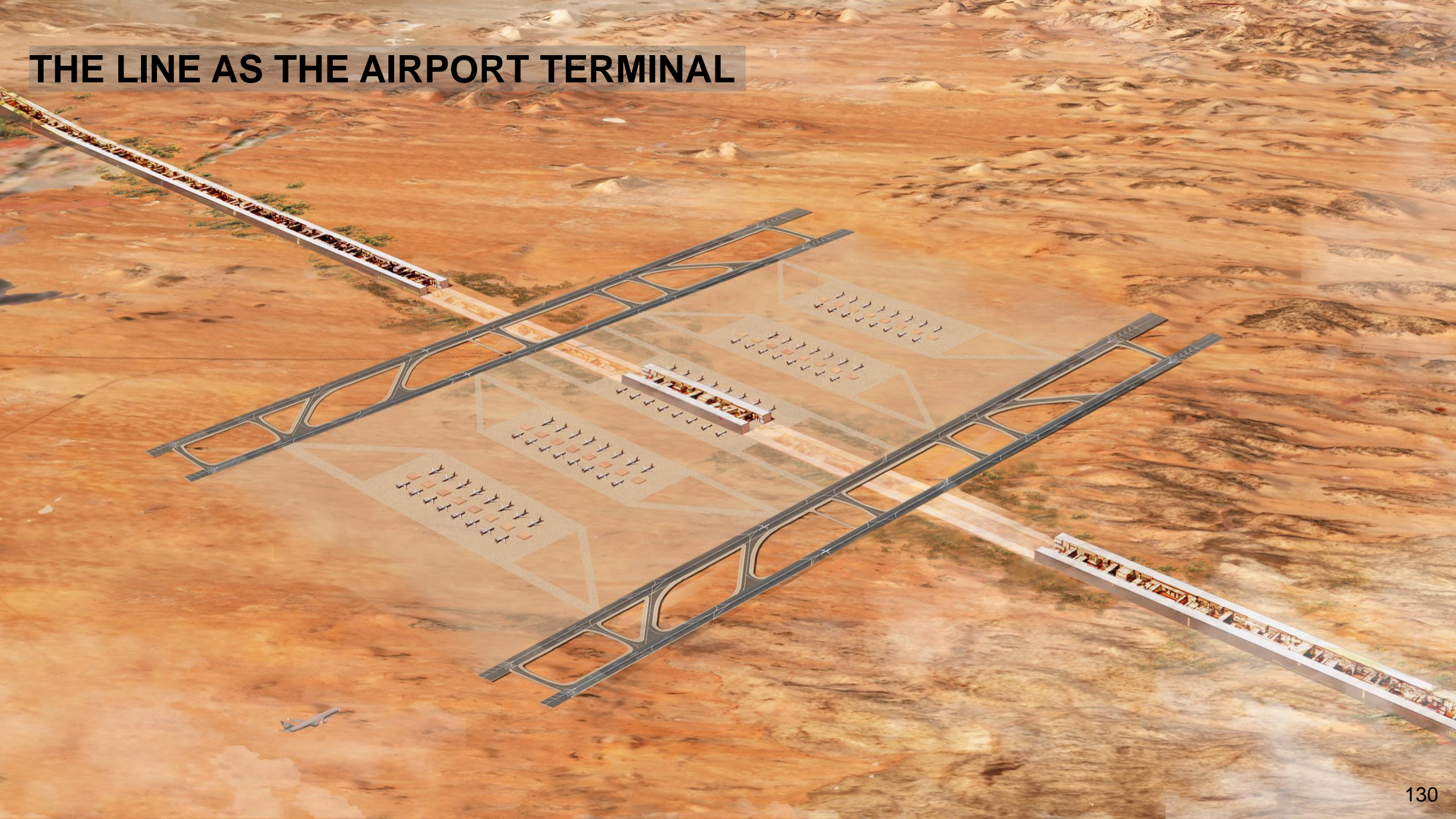
...creating superior passenger experience along the whole journey.

NEOM AIRPORTS

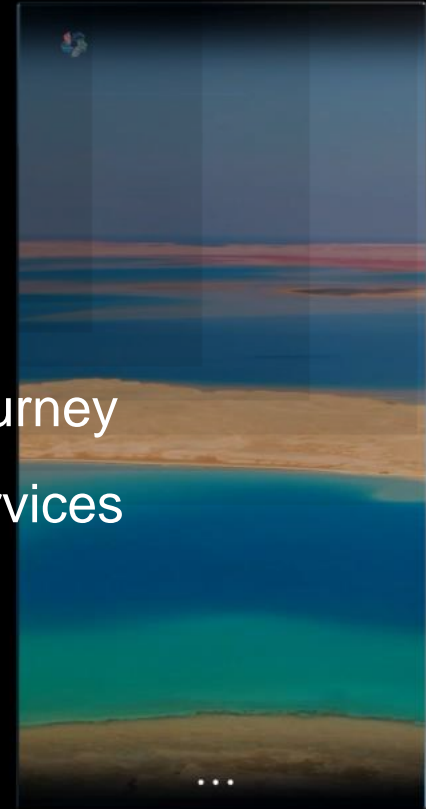
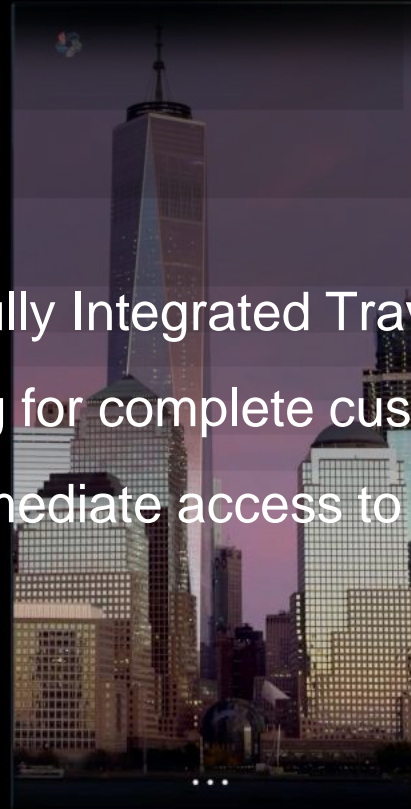
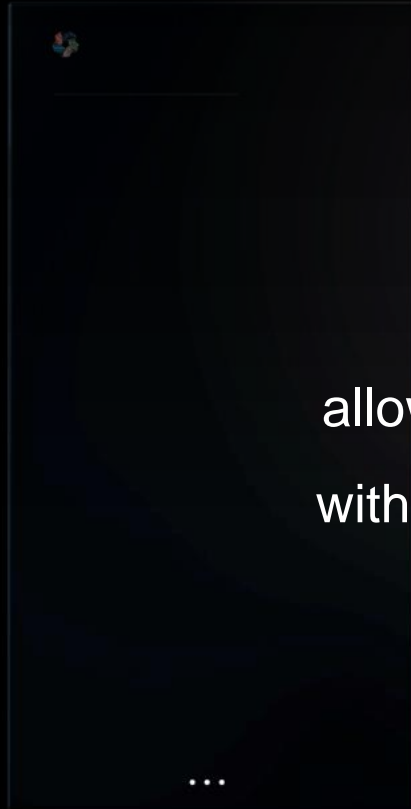
CURRENT AIRPORTS HAVE DESIGN AND EFFICIENCY CHALLENGES



THE LINE AS THE AIRPORT TERMINAL



Fully Integrated Travel Management platform
allowing for complete customization of the travel journey
with immediate access to changes in flights and services



We are looking for partners to help us develop our vision.





نيوم NEOM

THANK YOU



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Eng. Moataz Kurdi
Royal Commission for AlUla,
Chief Country Operations Officer



ALULA INTERNATIONAL AIRPORT

Program Overview





01

**Program
Background &
Strategy**

02

**Aviation
Program
Objectives**

03

**Development &
Achievement**

04

**Projects
Summary
Active projects**

Program Background & Brief



- Develop an incentive program to attract more airlines and bring in more frequent and seasonal flights to AlUla and to become permeant.
- Expansion to Accommodate Aviation and tourism growth.
- The strategy of AlUla county is to achieve 2.1M visitors and the current capacity of the airport is not supporting that.
- 01 • This project aims to develop and deliver the design for the new passenger terminal, private terminal, cargo, taxiway and apron to support the airport to accommodate this number.
- The new design will make an exceptional experience as a boutique and run an efficient aviation system to enable the sustainable development of Al-Ula.

Vision

The extraordinary gateway
to the living museum

Mission

Deliver an **exceptional**
experience and run an
efficient aviation system
to enable the **sustainable**
development of AlUla and
drive its **logistics potential**



AIUla International Airport Strategy



Vision: The extraordinary gateway to the living museum

Mission: Deliver an exceptional experience and run an efficient aviation system to enable the sustainable development of AIUla and drive its logistics potential

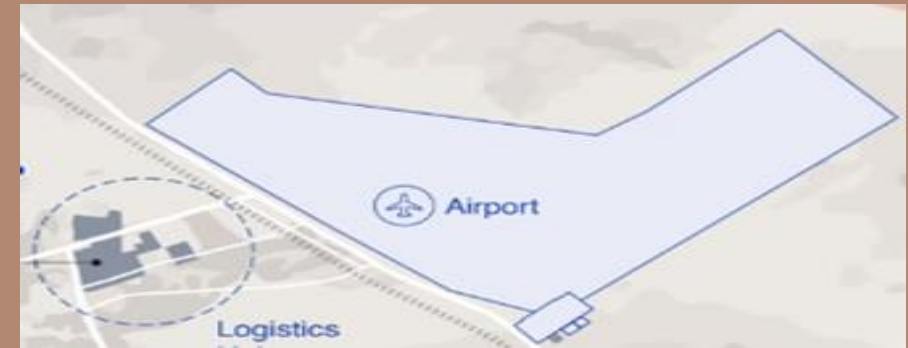
2021



Annual capacity **0.4 ~ 0.9 Mn pax**

- Limited air connectivity to key touristic destinations and regional hubs
- Capacity limitations to cater for future visitor demand
- Customer experience and service level standards is at the risk of not matching with targeted AIUla's visitors' profile
- Infrastructure needs to be developed and upgraded to cater sufficient capacity and capabilities, enabling to meet strategic objectives

2035



Annual capacity **> 5 Mn Pax**

- Strategy for ULH has been defined, cascading down from the main existing strategies, the key expectations by the RCU management, industry trends and the benchmarks of top comparable airports
- Fast-paced growth to accommodate AIUla developments, customer journey requirements and number of visitors/passengers expected

By 2035, AlUla airport is expected to handle a 4.5 Mn pax and 22,000 Tn per year, as well as host a growing Private and Leisure aviation business

		2021		2030		2035		CAGR	
								'21-'30	'21-'35
	Commercial Aviation	0.19 Mpax/year	1,900 ATMs/year	2.61 Mpax/year	26,900 ATMs/year	4.52 Mpax/year	46,000 ATMs/year	33.8%	25.4 %
	Private Aviation	834 pax/year	279 ATMs/year	4,500 pax/year	1,500 ATMs/year	10,000 pax/year	3,300 ATMs/year	20.6%	19.4 %
	Leisure Aviation	0 based aircraft	0 ATMs/year ¹	6 based aircraft	6,100 ATMs/year ¹	6 based aircraft	9,200 ATMs/year ¹	N/A	N/A
	Cargo	916 tonnes/year	<5 ATMs/year ²	16,200 tonnes/year	20-30 ATMs/year ²	22,000 tonnes/year	20-30 ATMs/year ²	37.6%	25.5 %

The current terminal has capacity max of 0.9 Mn pax/year, which will be reached by 2025 – a New terminal will be needed in advance

Program Description and Structure



Description: This Program aims to govern & implement the approved AlUla International Airport strategy, to meet RCU Aviation vision & mission. To develop a comprehensive offering of leisure and tourism attractions in AlUla, targeting 2million visitors & logistics by 2035.





Development & Achievement



Executive Terminal



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Royal Commission for AlUla



Private Aviation Hangar



FBO – Fixed-Base Operator



FBO
Private Aviation Terminal

Landscape development



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Royal Commission for AlUla





Old Apron



| Apron & Taxiway

المينة الملكية لمحافظة العلاء
Royal Commission for AlUla







AlUla Destination

Saudi Airlines

- Paris
- Riyadh
- Jeddah



Flynas

- Dubai
- Riyadh
- Cairo
- Dammam

Flydubai

- Dubai

Royal Jordanian

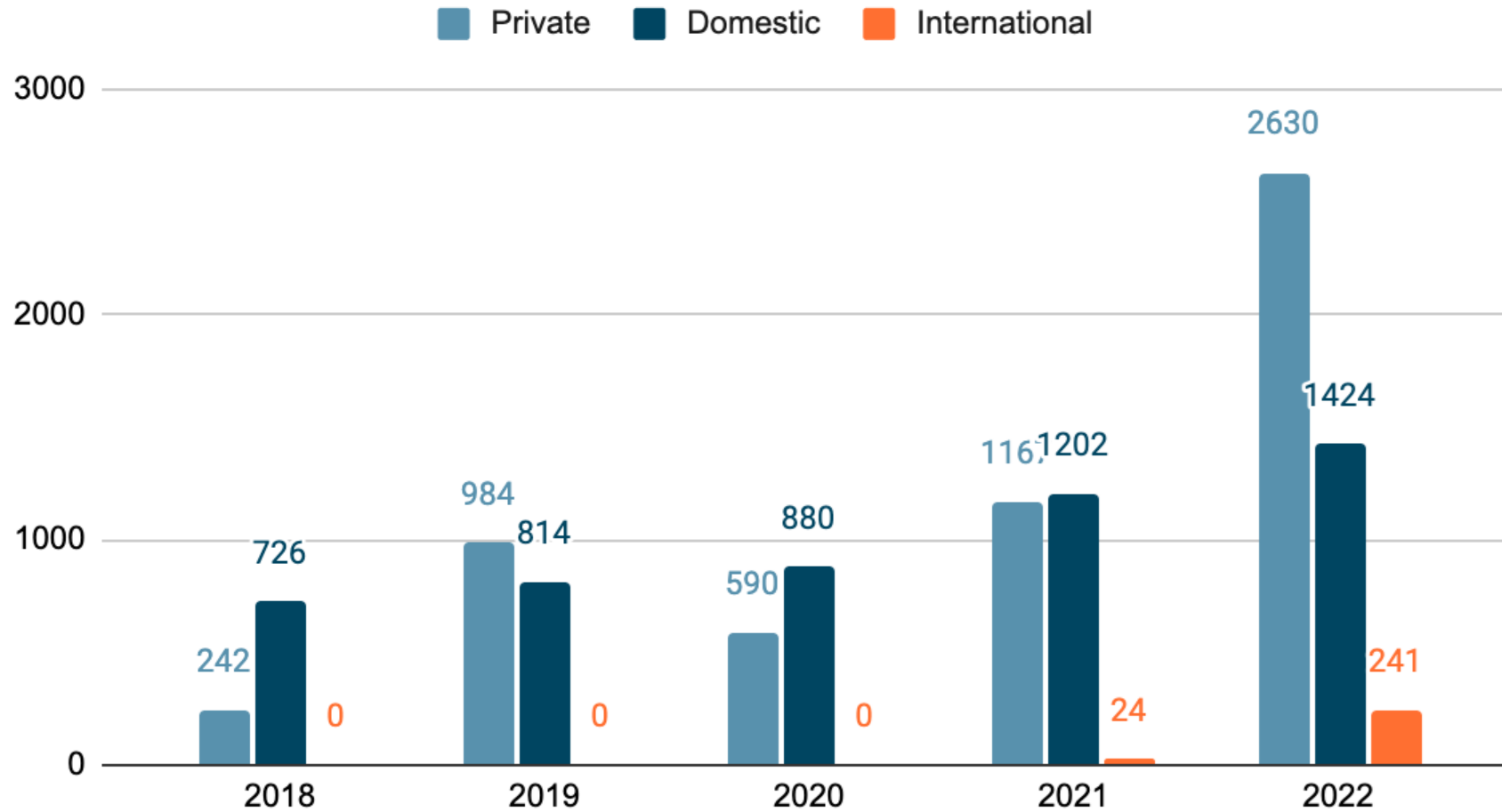
- Amman





Total Number of Flights: 2018-2022

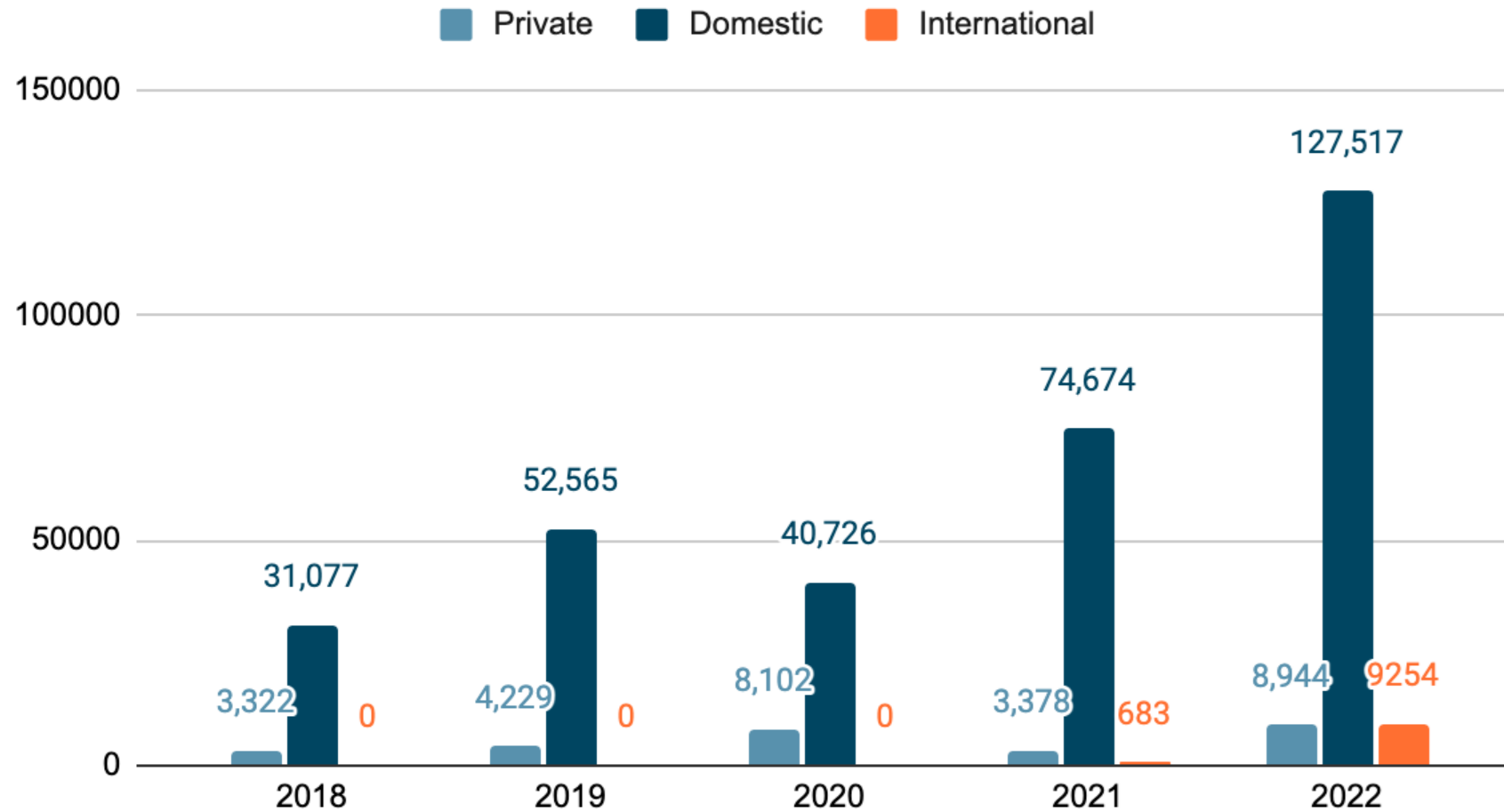
Total Number of Flights: 2018-2022





Total Number of Passengers: 2018-2022

Total Number of Passengers: 2018-2022



Thank you





Airport security, a key asset to achieve the Airport ambitions of the Vision 2030



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**Mr. Turki Bin Matoonq Al Thonayan,
The National Security Services Company
(SAFE),
CEO**