



أثر التكامل

INTEGRATED IMPACT





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Our country continues its journey toward a brighter future, building on a decade of remarkable progress achieved under Vision 2030. The Kingdom has emerged as a leading example of how to effectively harness its capabilities and resources to drive comprehensive development, with impact clearly reflected in the enhanced quality of life for its people.



Custodian of the Two Holy Mosques

King Salman bin Abdulaziz Al Saud

May Allah Protect Him



After a decade of progress under Vision 2030, our nation has shown how ambition can be turned into real results through the determination of its people and the strength of its institutions. The progress achieved in recent years means we must now build on this momentum, step up our efforts, and strengthen our plans to sustain this progress and continue improving the lives of our people.



His Royal Highness

Prince Mohammed bin Salman bin Abdulaziz Al Saud

Crown Prince, Prime Minister, and Chairman of the Council of Economic and Development Affairs

May Allah Protect Him





NIDLP Chairman's Message

His Excellency Mr.

Bandar bin Ibrahim Alkhorayef

Minister of Industry and Mineral Resources,
Chairman of NIDLP Committee

During 2025, the National Industrial Development and Logistics Program (NIDLP) transitioned into a more mature phase of its execution journey, driven by deepening economic impact and fostering synergy among its four core sectors: Energy, Mining, Industry, and Logistics, therefore boosting the competitiveness of the national economy, supporting supply chain reliability, and unlocking broader horizons for sustainable growth.

This advancement is evidenced by a (91.9%) performance rate in meeting the NIDLP's 2021–2025 execution targets, with (93%) of all initiatives either completed or progressing as planned. Such results reflect efficient execution, robust inter-agency coordination, and NIDLP's capacity to translate the Saudi Vision 2030 goals into tangible economic outcomes.

NIDLP has delivered several positive economic indicators reflecting its direct impact on the national economy. By the end of 2025, NIDLP's sectors contributed over USD (278.7 billion) to GDP, with their share of non-oil GDP rising to nearly (39%). Non-oil exports exceeded USD (161.1 billion), recording (14%) growth—a clear reflection of the increasing global competitiveness of national products.

The year 2025 witnessed significant transformations across NIDLP's sectors. In the Energy Sector, renewable energy projects continued to expand, yielding world-record benchmarks in electricity generation costs. The total capacity under signed power purchase agreements surpassed (43 GW) thereby enhancing the diversification of the energy mix and supporting the sustainability of industrial and economic growth.

In the Industry Sector, industry empowerment efforts continued through the launch of Specialized industrial clusters and the localization of advanced industries, including biopharmaceuticals, automotive and aviation manufacturing, and space technologies. Notably, this includes the development of the first Saudi satellite to study space weather in cooperation with NASA, thereby driving industrial diversification, boosting local content, and advancing the Kingdom's transition toward more advanced, value-added industries.

The mining sector also witnessed remarkable momentum, driven by the continued implementation of geological surveying activities across the Arabian Shield and the growing attractiveness of notable momentum, with continued geological survey activities across the Arabian Shield and a rising attractiveness of mining investment in the Kingdom. The King-

dom advanced by 81 positions to rank 10th in the Mining Investment Attractiveness Index. In addition, high-value Memoranda of Understanding (MoUs) exceeding USD (26.7 billion) were signed, reflecting growing global confidence in Saudi Arabia's investment environment and reinforcing the sector's emerging role as the third pillar of national industry and a key driver of the future economy.

In the Logistics Sector, NIDLP continued to deliver significant transformations in infrastructure development and multimodal transport connectivity through the activation of strategic projects, port expansions, and the establishment of integrated logistics zones. It also improved operational efficiency and reduced clearance times at border crossings, facilitating the flow of goods and services within the Kingdom and to regional and global markets, while reinforcing the Kingdom's position as a pivotal logistics hub linking three continents.

Finally, I would like to extend my deepest gratitude and appreciation to the Custodian of the Two Holy Mosques, King Salman bin Abdulaziz Al' Saud, and His Royal Highness Prince Mohammed bin Salman bin Abdulaziz Al Saud, Crown prince and Prime Minister, -May Allah protect them- for their generous support and continuous patronage of NIDLP and its sectors. Their unwavering support has been instrumental in enabling these achievements and strengthening integration and collaboration across sectors.

I also extend my sincere thanks and appreciation to Their Excellencies the members of NIDLP Committee, our partners in the execution entities, all working teams and NIDLP personnel, and our partners from the private sector, for their dedicated efforts and the high level of commitment and professionalism they demonstrated in implementing initiatives and achieving objectives, driven by a spirit of cooperation and shared responsibility.

We look ahead to the next phase with greater confidence, building upon our accomplishments to date, and moving forward from meeting targets to maximizing impact, and from implementing initiatives to embedding transformation, in a manner that contributes to fulfilling the aspirations of the wise leadership and strengthens the Kingdom's position in the global economy.

May Allah grant us all success.

Program Overview

NIDLP aims to transform the Kingdom into a leading industrial powerhouse and a global logistics hub by maximizing the value achieved from the mining and energy sectors, as well as integrating the two focus areas of local Content and the Fourth Industrial Revolution .

Sectors



Energy



Mining



Industry



Logistics

The program will significantly contribute to maximizing and diversifying the economic impact of the targeted sectors, sustaining their growth, achieving their leadership, and creating an attractive investment environment in each of them. NIDLP was launched early 2019, based on the leadership's confidence in the importance of the four program sectors (Energy, Mining, Industry, and Logistics). Their integration is key to achieving added value, maximizing, and diversifying the economic impact, and creating an attractive investment environment. The program significantly prioritises the two focus areas of local content and the fourth industrial revolution, considering them among the most important enablers of the included sectors, as well as key factors that support each sector in reaching their objectives and the desired impact.

Focus Pillars



Fourth Industrial Revolution



Local Content

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

NIDLP Committee Members



His Excellency Mr.
**Bandar bin Ibrahim
Alkhorayef**

Minister of Industry and Mineral
Resources
NIDLP Chairman Committee
Chairman of the Local Content and Gov-
ernment Procurement Authority



His Excellency Eng.
Saleh bin Nasser Aljasser

Minister of Transport and Logistic
Services
Vice Chairman of NIDLP Committee



His Excellency Eng.
Abdullah bin Amer Alswaha

Minister of Communications
and Information Technology
NIDLP Committee Member



His Excellency Mr.
Faisal bin Fadhel Alibrahim

Minister of Economy and
Planning
NIDLP Committee Member



His Excellency Eng.
**Khalil bin Ibrahim Ibn
Salamah**

Vice Minister of Industry and Min-
eral Resources for Industry Affairs
NIDLP Committee Member



Eng.
**Ahmed bin Musa
Al-Zahrani**

Representative of the Ministry of
Energy
NIDLP Committee Member



Dr.
**Abdullah bin Ali Al-
dubaikhi**

Representative of the Ministry of
Investment
NIDLP Committee Member

Success Partners

01

02

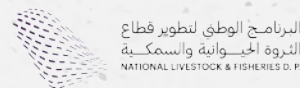
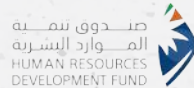
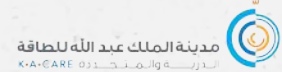
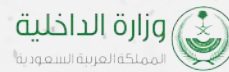
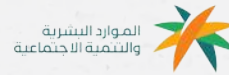
About NIP

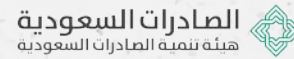
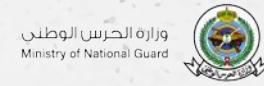
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Program Objectives



3

Vision Themes



Vibrant Society



Thriving Economy



Ambitious Nation

1 of 6

of Level-1 Objectives

Strengthen Islamic values and national identity.

Offer a fulfilling & healthy life

Increase Employment

Grow & Diversify the Economy

Enhance government effectiveness

Enable social responsibility

Direct Contribution



Indirect Contribution



4 of 27

of Level-2 Objectives

◆ Grow contribution of the private sector to the economy.

◆ Maximize value captured from the energy sector.

◆ Unlock the potential of non-oil sectors.

◆ Position Saudi Arabia as a global logistic hub.

12 out of 96

Level-3 Objectives



National Industrial
Development and
Logistics Program

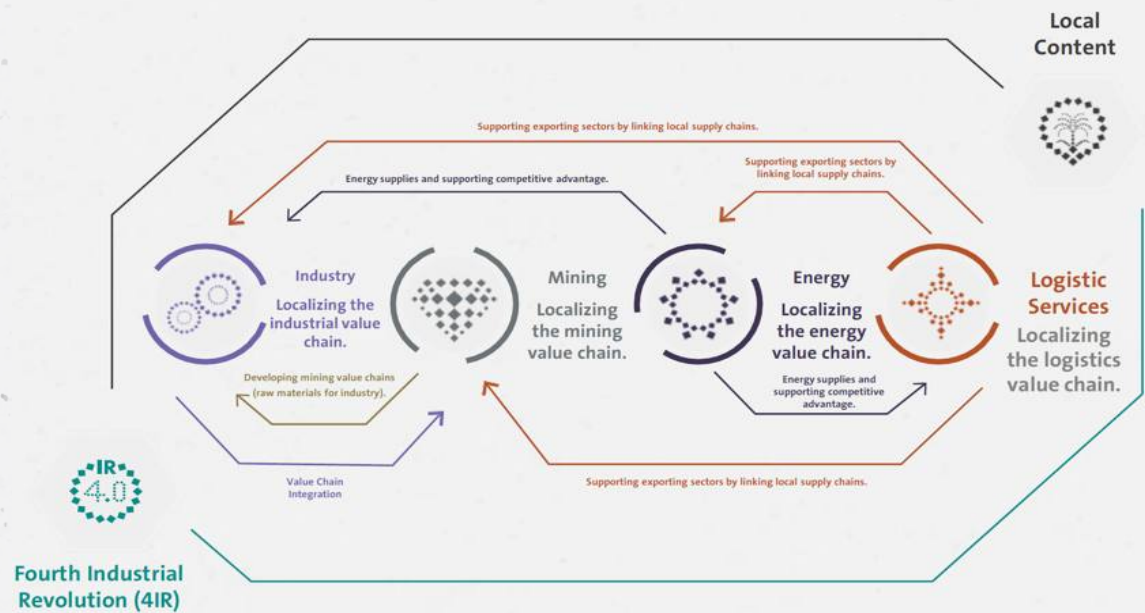
- Create special zones and rehabilitating economic cities.
- Increase localization of oil and gas sector.
- Increase gas production and distribution capacity.
- Develop Oil & Gas-adjacent industries.
- Grow the Contribution of Renewables to the National Energy Mix.
- Enhance the competitiveness of the Energy Sector.
- Grow and capture maximum value from the mining sector.
- Localize promising manufacturing industries.
- Localize military industries.
- Increase localization of non-oil sectors.
- Create and improve performance of logistic hubs.
- Improve local, regional, and international connectivity of trade and transport networks.

Integrating Towards a Prosperous Future

Combining the four sectors in a single program is an ingenious idea conceived by His Royal Highness the Crown Prince, Prime Minister, and Chairman of the Council of Economic and Development Affairs.

The integration of these sectors and the two focus areas is crucial for creating a thriving and diversified economy, increasing the contribution of these sectors to the Kingdom's GDP, and maximizing the added value.

NIDLP is working to strategically align these sectors to maximize the synergy between their inputs and outputs, while developing execution mechanisms that ensure the practical realization of Saudi Vision 2030 objectives.



NIDL Strategy

The program relies on 4 important strategic pillars to achieve its ambitious objectives:

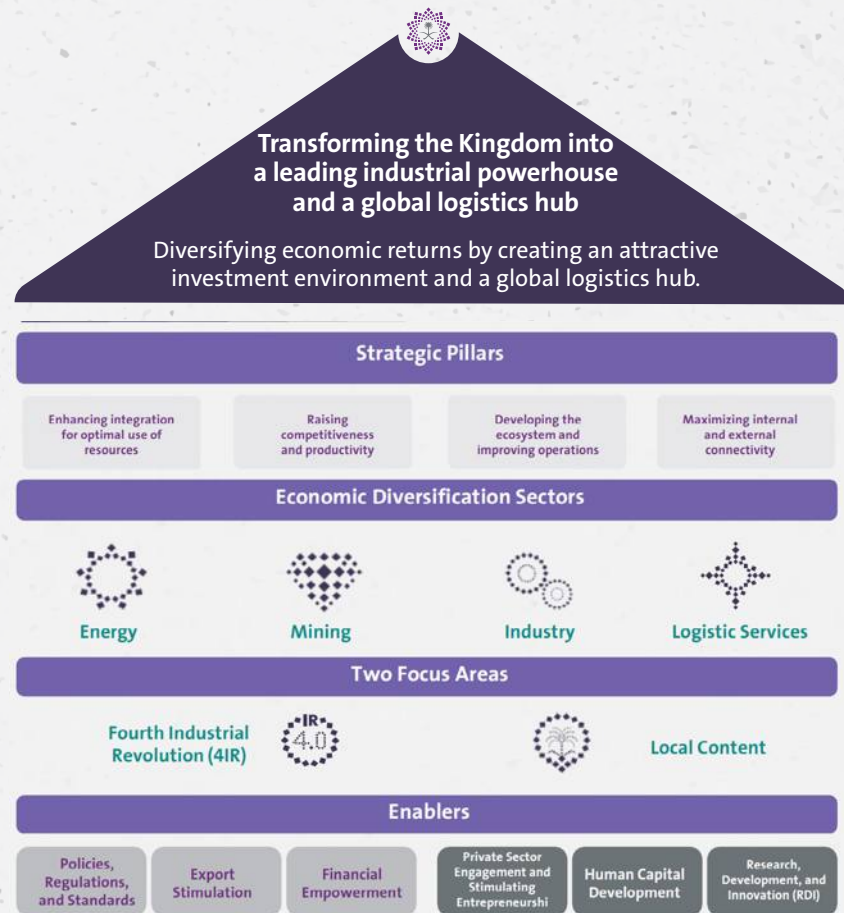
1. Promote integration to fully leverage the Kingdom's resources, including natural, physical assets and human resources.
2. Raise competitiveness and productivity, providing the necessary capabilities to be a leading country worldwide.
3. Develop the ecosystem and improve operations to prioritize investor needs and added value, rather than focusing solely on investment.
4. Maximize internal and external connectivity, and ensuring access to demand areas in global regions.

The strategy follows a development model That starts with:

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

Relies on:

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



Economic Indicators





The Kingdom is witnessing a transformative shift that is reshaping its production structure and enhancing the sophistication of its economy. This is being achieved through the development of advanced, high-value-added sectors and the improvement of the regulatory environment that enables investment. This transformation has contributed to boosting the competitiveness of the national economy, deepening its integration into global value chains, and solidifying the Kingdom's position as a leading investment destination and a primary driver of economic growth in the region.

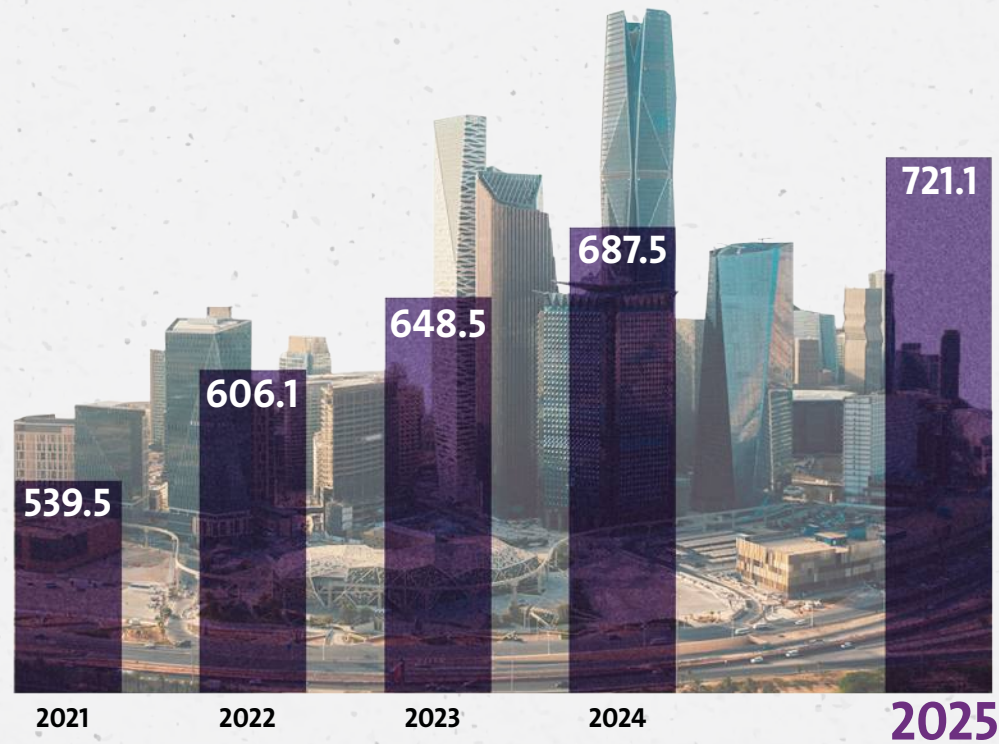


His Excellency Mr.

Faisal bin Fadhel Alibrahim

Minister of Economy and Planning

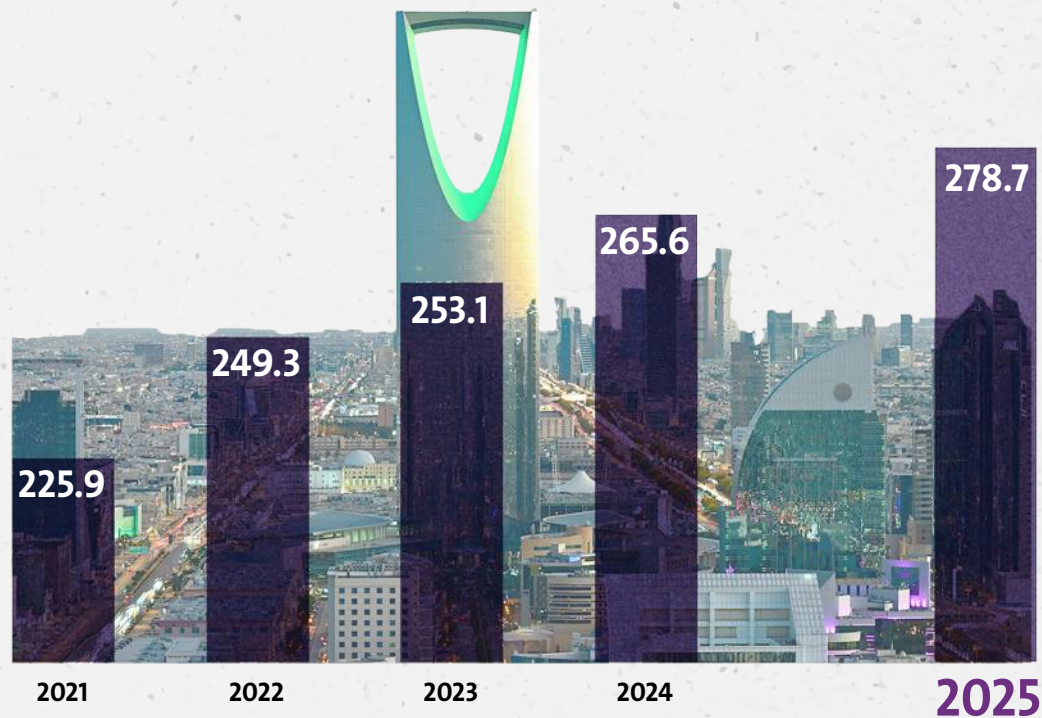
Local Economy



Real GDP for Non-Oil Activities (USD Billion)

55%

The contribution of non-oil activities to the Kingdom's GDP



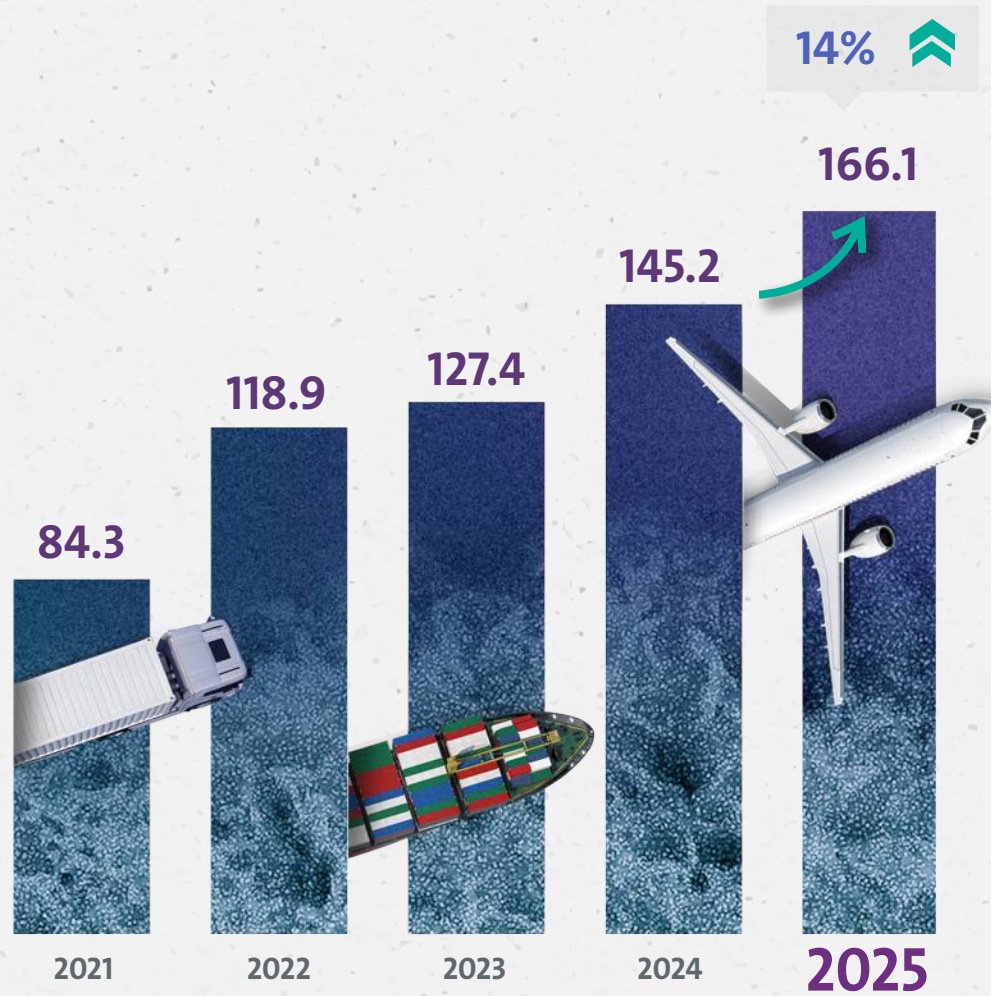
Real GDP for NIDLP Sectors' Activities (USD Billion)

39% The contribution of the Program's sector activities to the Kingdom's non-oil GDP

Non-oil activities continued to expand, accounting for approximately (55%) of the Kingdom's real GDP in 2025. Within this, the Program's sector activities contributed around (39%) of the Kingdom's non-oil GDP. During 2025, several Program-related sectors recorded positive growth rates, with other mining and quarrying activities , and transportation and storage activities increased by 3% and 4%, respectively. Manufacturing activities also recorded growth of 5% during the year.

Total Non-Oil Exports

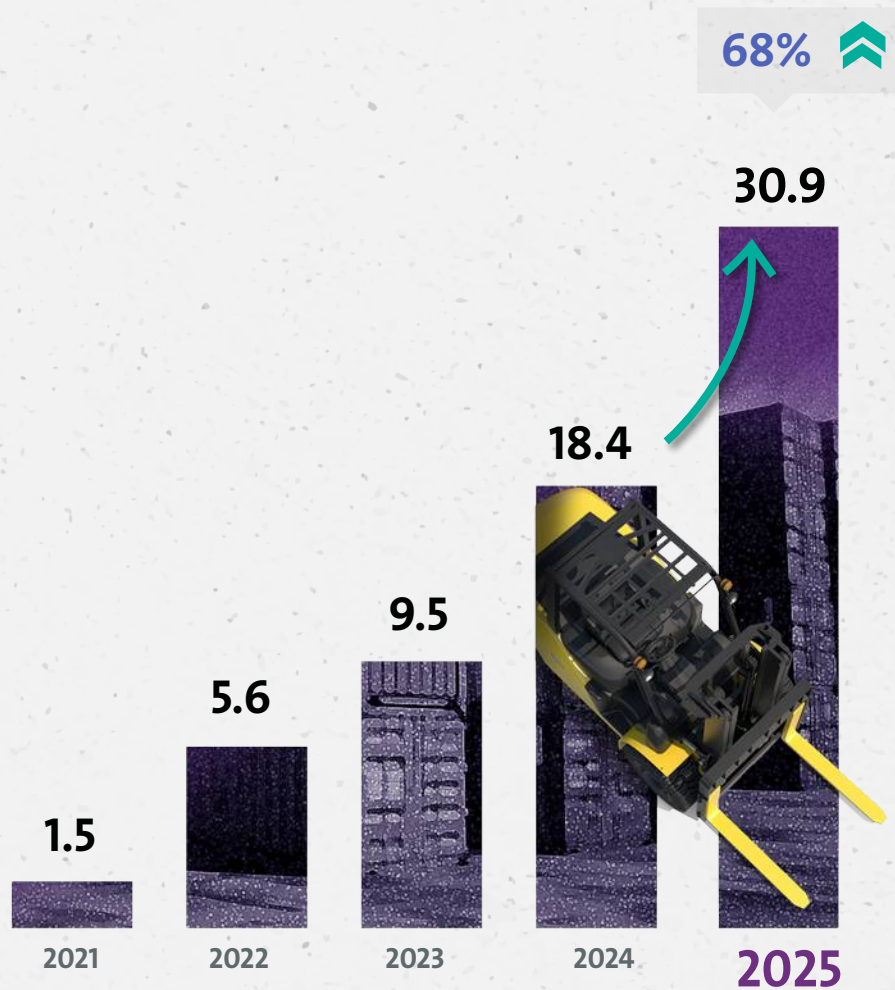
(USD Billion)



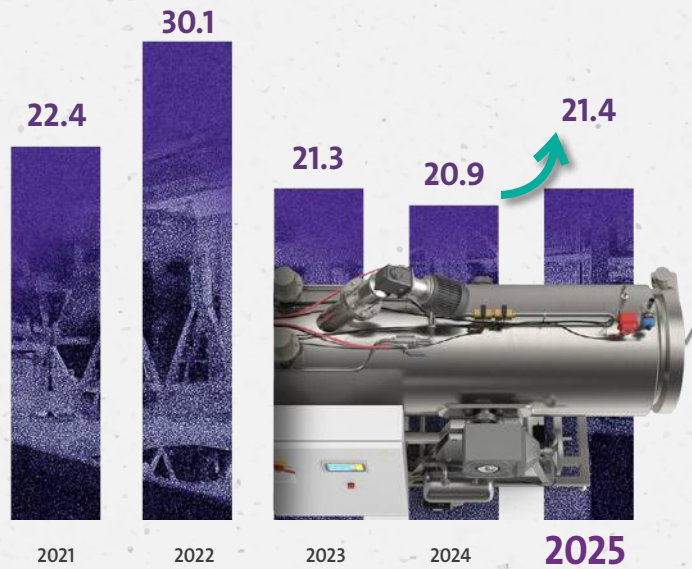
Source: General Authority for Statistics.

Cumulative Total Credit Facilities Utilized by Saudi EXIM Bank

(USD Billion)

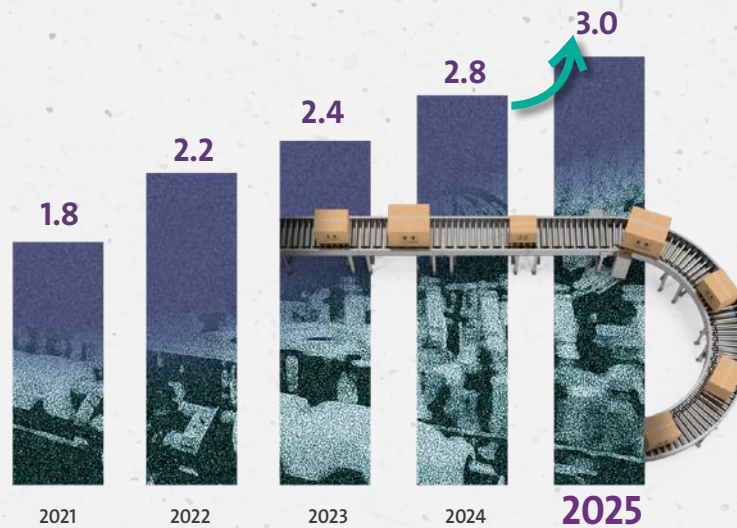


Source: Saudi EXIM Bank



Exports of Products of the Chemical Industries

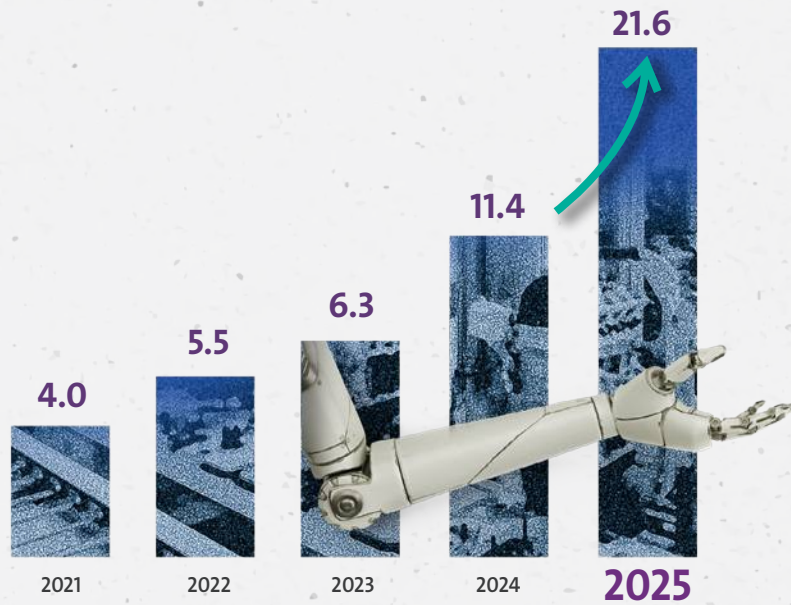
(USD Billion)



Exports of Food and Beverage Manufacturing Products

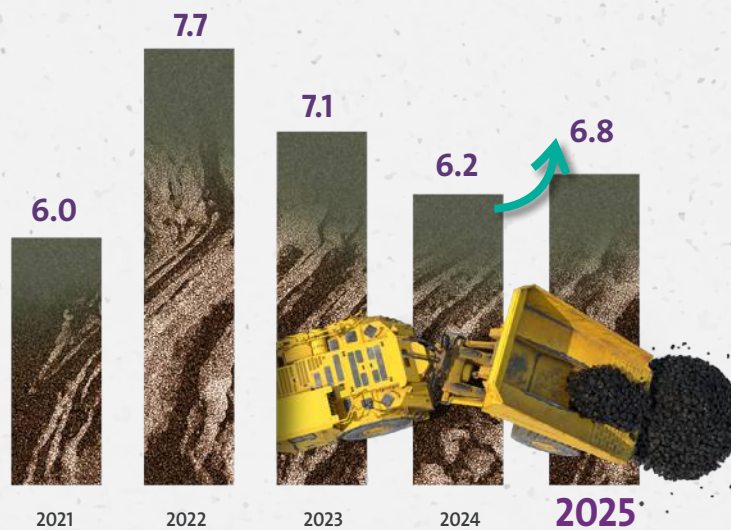
(USD Billion)

Source: General Authority for Statistics (including re-exports).



Exports of Machinery,
 Electrical Equipment,
 and its components

(USD Billion)

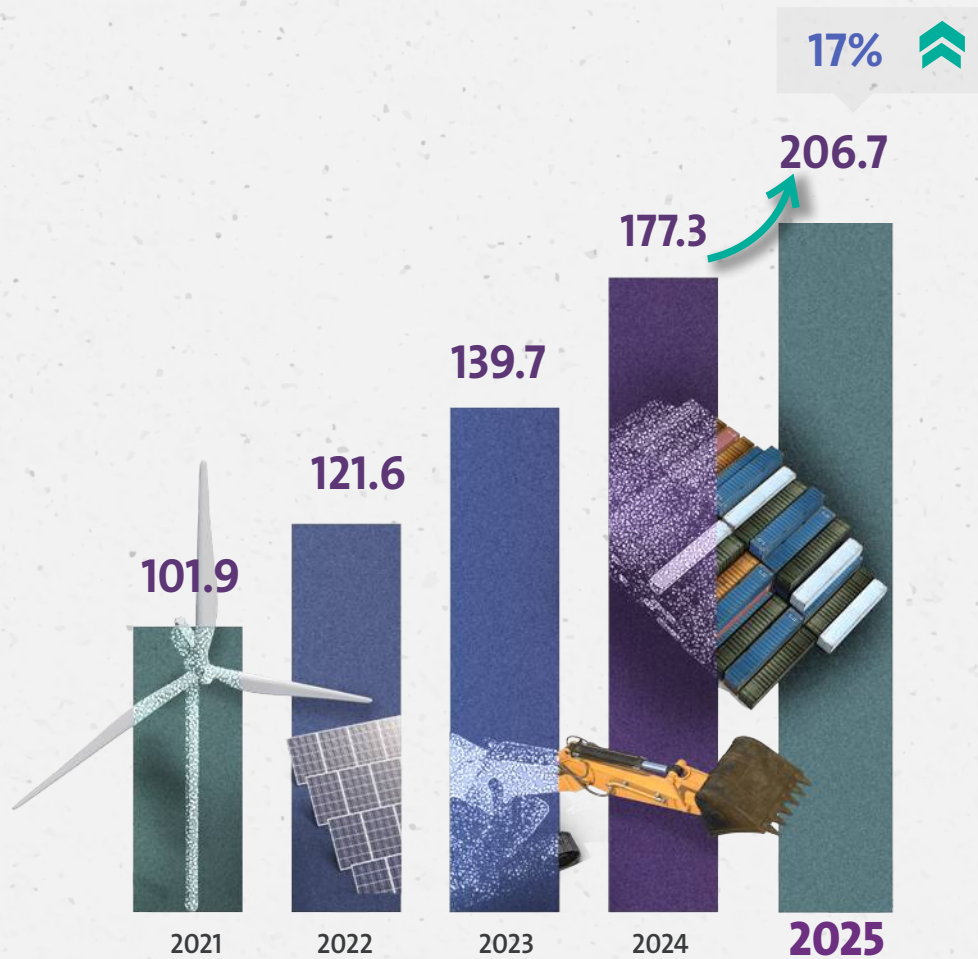


Exports of Base Metals
 and their Articles

(USD Billion)

Source: General Authority for Statistics (including re-exports).

Cumulative Non-Government Investments in the Program's Sectors (USD Billion)



Total Achieved Non-Government Investments in NIDL's Sectors (Cumulative)

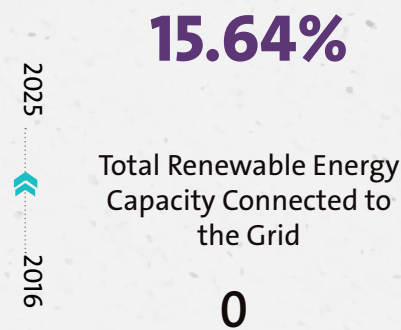
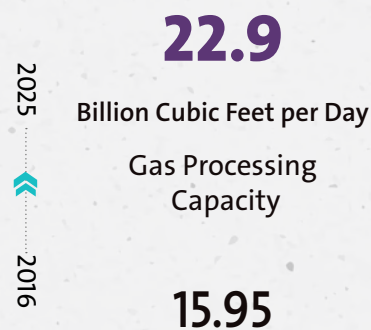
SIDF Net Loan Credits (Cumulative) (USD Billion)

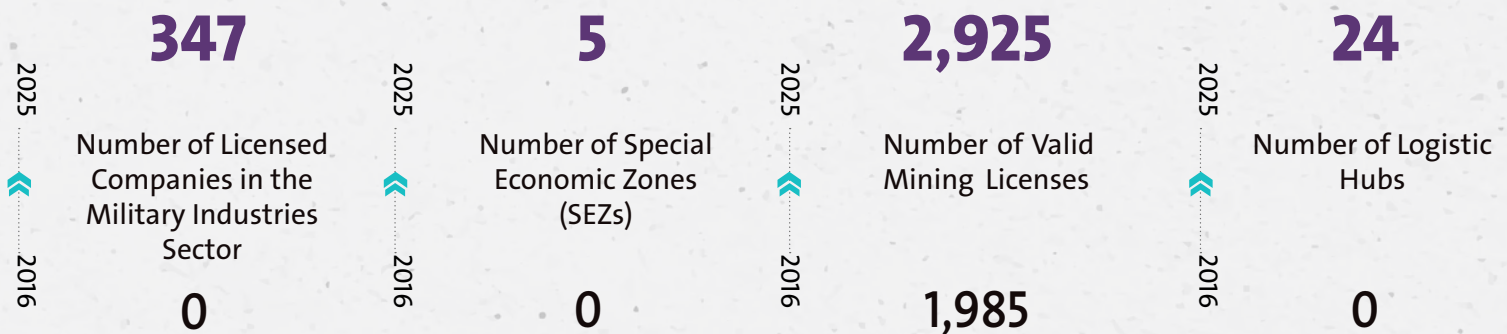
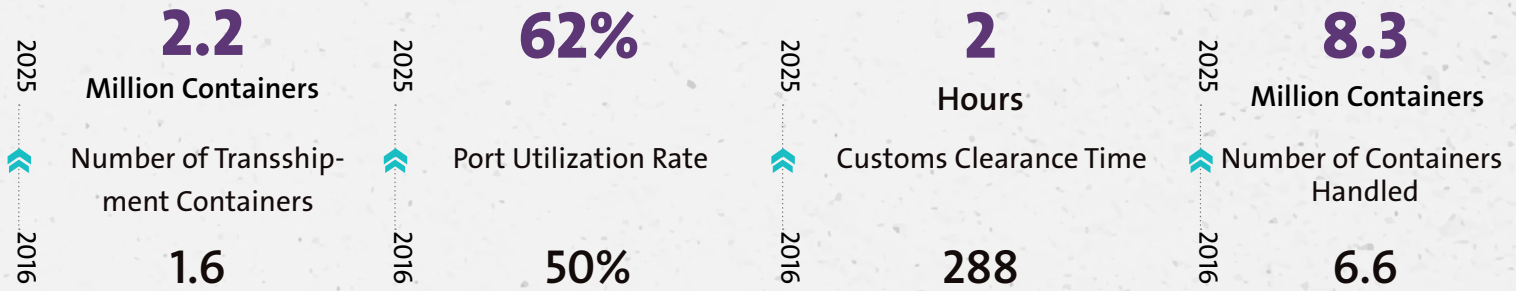
80% 



Source: SIDF.

Key Facts and Figures Since the Launch of the Saudi Vision 2030







Key Performance

Indicators

Key Indicators

Cumulative Non-Government Investment (USD Billion)

(in economic and industrial cities and special Zones)

Baseline	2019	329.2	Target	2025	357.6	Actual	2025	390.9
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Cumulative Military Sales of Domestic Companies (USD Billion)

Baseline	2019	0.9	Target	2024	8.1	Actual	2024	17.7
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To be released by mid-year of the following year

Port Utilization Rate (%)

Baseline	2019	50.2	Target	2025	70	Actual	2025	62
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Cumulative Export Value of Promising Industries (USD Billion)

Baseline	2019	5.0	Target	2025	32.2	Actual	2025	43.6
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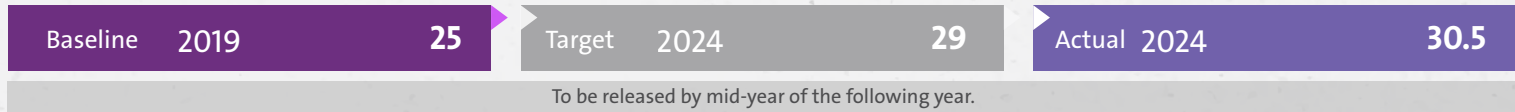
Number of Valid Final Licenses Issued for Promising Industries (Number)

Baseline	2019	169	Target	2025	1040	Actual	2025	2894
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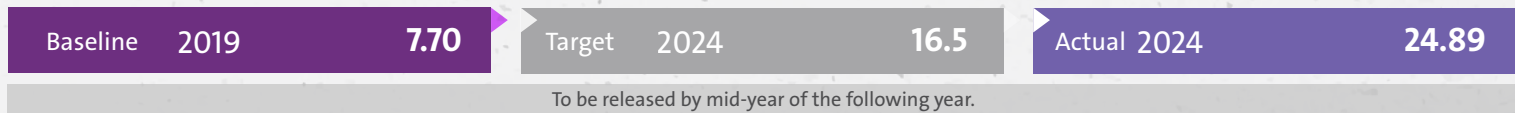
Number of Logistics Centers with Possible Re-export Links (Number)

Baseline	2019	2	Target	2025	20	Actual	2025	24
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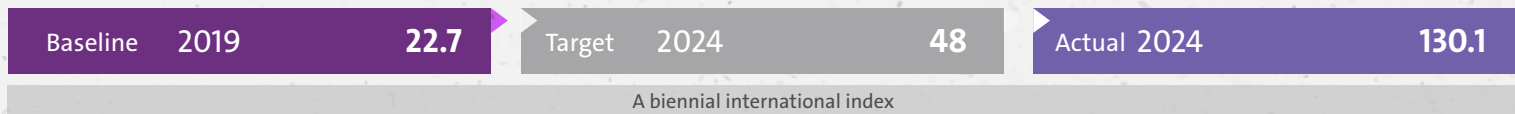
Percentage of localization in pharmaceutical industries (%)



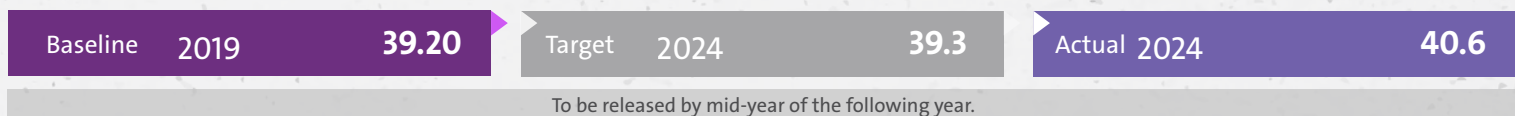
Percentage of Localization in Military Industries (%)



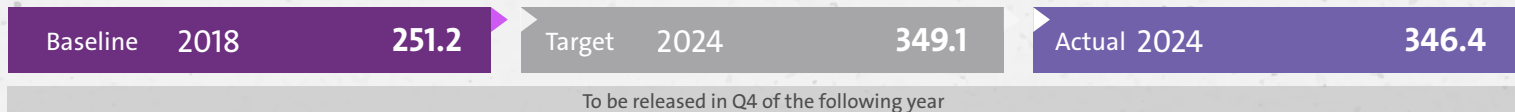
Total Annual Exploration Expenditure per Square Kilometer (USD)



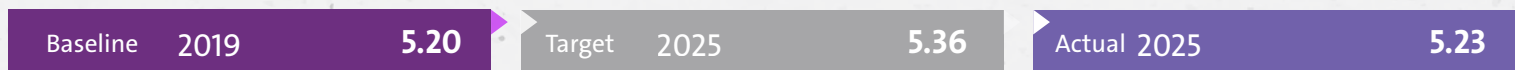
Electricity Generation Efficiency (%)



Final Spending Value of Local Content in Non-oil Sector (USD billion)



Quality of Road Infrastructure (mark out of 7)



Program Sectors and Focus Areas

01

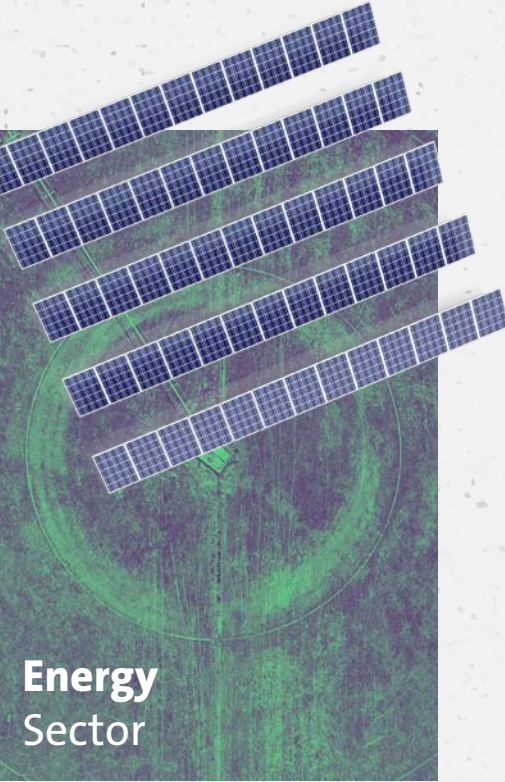
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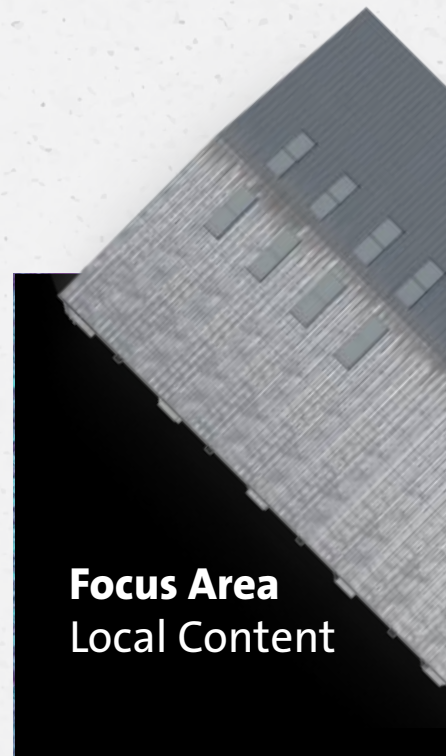
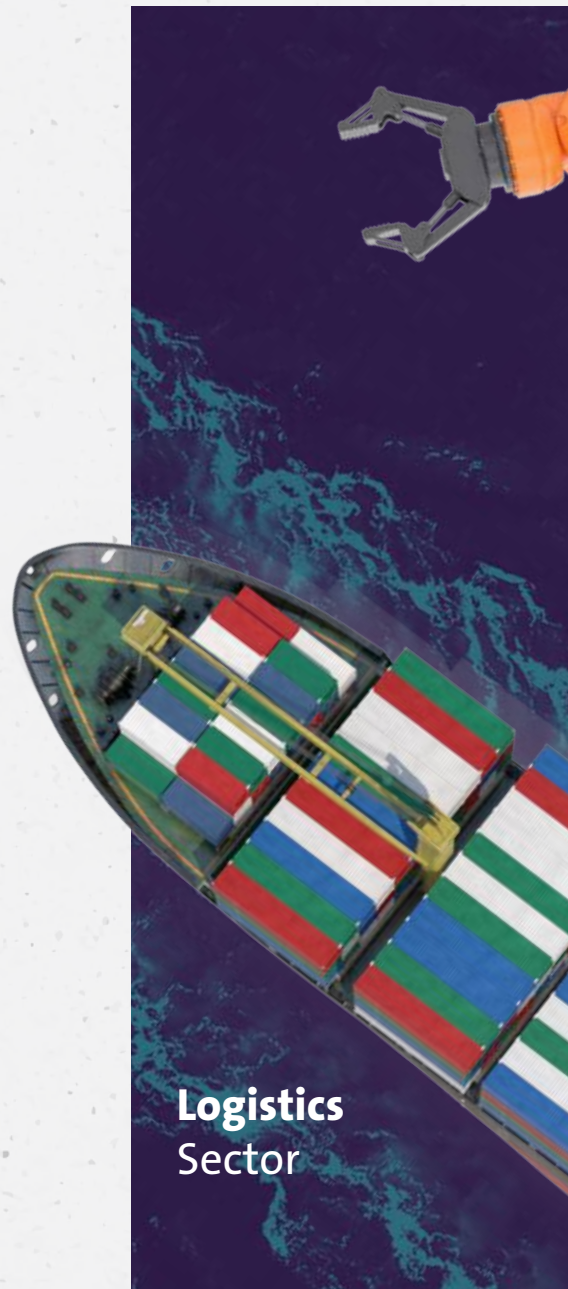
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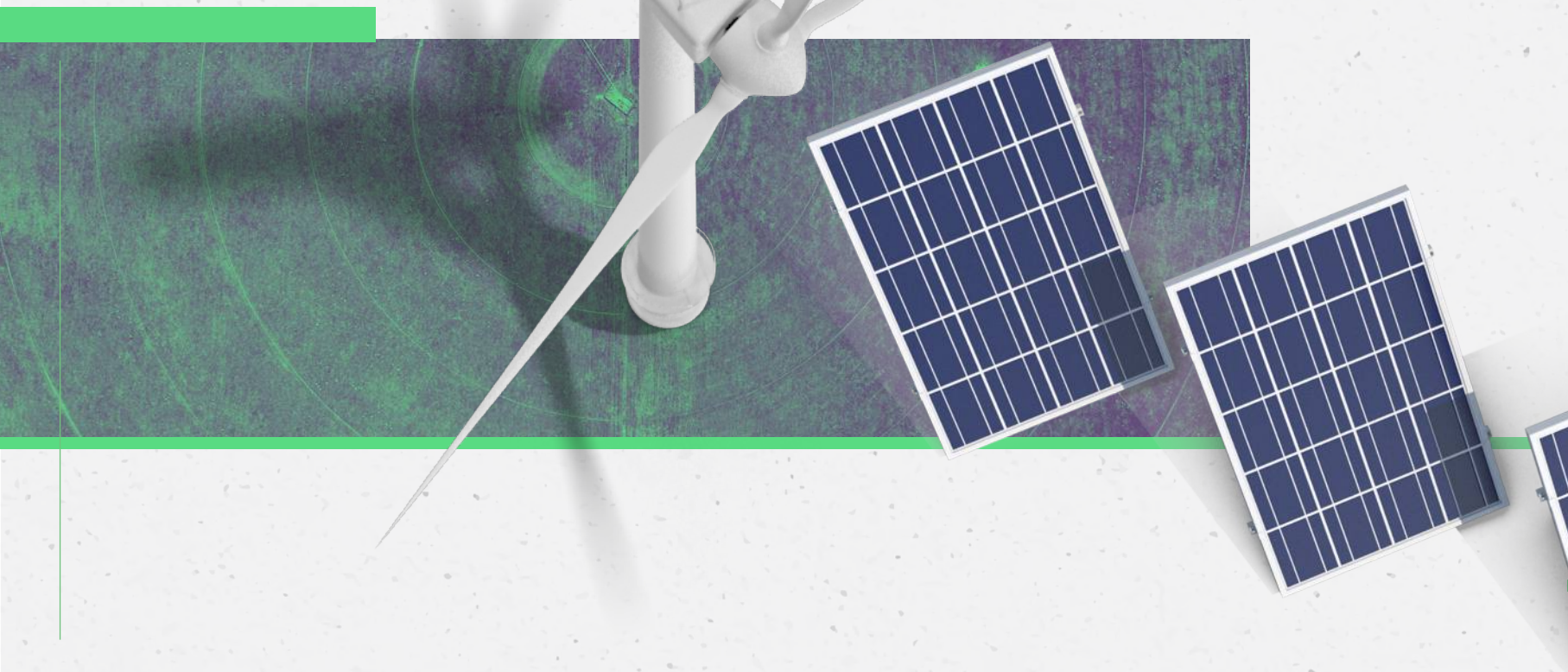
05

06





Energy Sector





All energy sources have an important role to play, including petroleum, natural gas, renewable energy, nuclear power, hydropower, and hydrogen. Our priority is to adopt a **balanced, comprehensive, and pragmatic** approach that balances these diverse sources.



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

Energy Sector Directions aim to Maximize the Value Generated from the Sector by:



Enhancing the infrastructure of the Saudi electricity sector to promote and sustain economic growth.



Increasing the share of renewables in the domestic energy mix to nearly (50%) by 2030, complemented by high-efficiency natural gas. This also includes building the national capabilities to assert the Kingdom's position as a global leader in renewable energy and strengthening legislative and regulatory frameworks to support complementary energy sectors for maximum economic return.



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



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

Our Objectives

Increasing

gas production and distribution capacity.

Enhancing

the energy sector's competitive edge.

Boosting

the contribution of renewable energy sources in the energy mix.

2030 Aspirations

Achieving global leadership in the renewable energy sector.

Provide competitive electrical services to consumers to ensure the sector's sustainability.

increased the Kingdom as a global leader in the renewable energy sector.

Increasing the share of renewable energy sources to approximately

Localizing the entire value chain and increasing the local content percentage in the oil and gas sector to

75%

50%

To achieve an optimal power generation mix.

Top Achievements

وزارة الطاقة
MINISTRY OF ENERGY



Signing of Power Purchase Agreements (PPAs) for Multiple Projects with an Aggregate Capacity of 20.2 GW

The Ministry of Energy concluded PPAs for several projects, including the Phase VI projects (Samtah, Aldawadmi, Najran, Aldarb, and Baish) with a total capacity of (4.5 GW), and two wind energy projects (Sitara and Shaqra) under the 5th wave with a capacity of (3 GW); in addition to the 6th wave solar energy projects (Bisha, Khulais, Al-Hamij, Afif 1, and Afif 2) with a capacity of (12 GW), and Yanbu wind energy project under Phase IV with a capacity of (0.7 GW), bringing the total capacities covered by the expected Power Purchase Agreements PPAs to more than (43 GW).

كفاءة
المركز السعودي لكفاءة الطاقة
Saudi Energy Efficiency Center

“Window AC Replacement” Initiative Targets Achieved at 100%

To enhance energy efficiency in the residential sector, the Saudi Energy Efficiency Center (SEEC) launched its full-scale “Window AC Replacement” initiative, swapping out low-efficiency window air conditioners for modern, higher-efficiency units. Approximately (249,000) low-efficiency units were replaced out of a targeted (250,000). The initiative achieved (100%) of its target six months ahead of schedule, generating substantial energy savings and preserving natural resources.



Geographic Survey Project Targets Achieved for Renewable Energy Sources

In support of the National Renewable Energy Program (NREP) targets, the Ministry of Energy launched the Geographic Survey Project. It provides reliable, bankable data for renewable energy projects, which will lower development costs, accelerate project development timelines by 18 to 24 months, and prioritize sites. This directly reduces electricity production costs. The project has successfully deployed (826) measuring stations across the Kingdom, surveying over (577,000 km²).



Implementation of a Solar Thermal Water Desalination Project

King Abdullah City for Atomic & Renewable Energy (KACARE), in partnership with the Saudi Water Authority, completed the development of an innovative, low-pressure thermal technology for water treatment, reuse, and seawater desalination using Forward Osmosis (FO) technology. The project features a thermal coupling design linking a Concentrated Solar Power (CSP) system with the FO system to achieve effective and sustainable integration between both technologies. The Project was awarded the Engineering Excellence Award at the Asian Water Awards 2025, which honors innovation and sustainability.



وزارة الطاقة
MINISTRY OF ENERGY



Completion of the Geothermal Energy Exploration Study

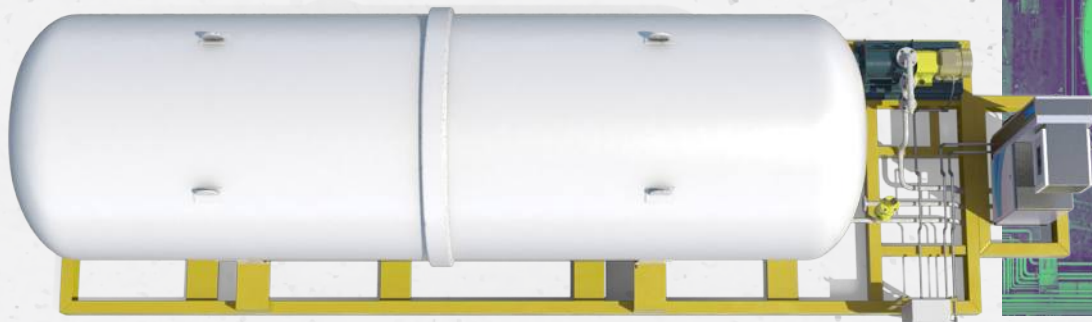
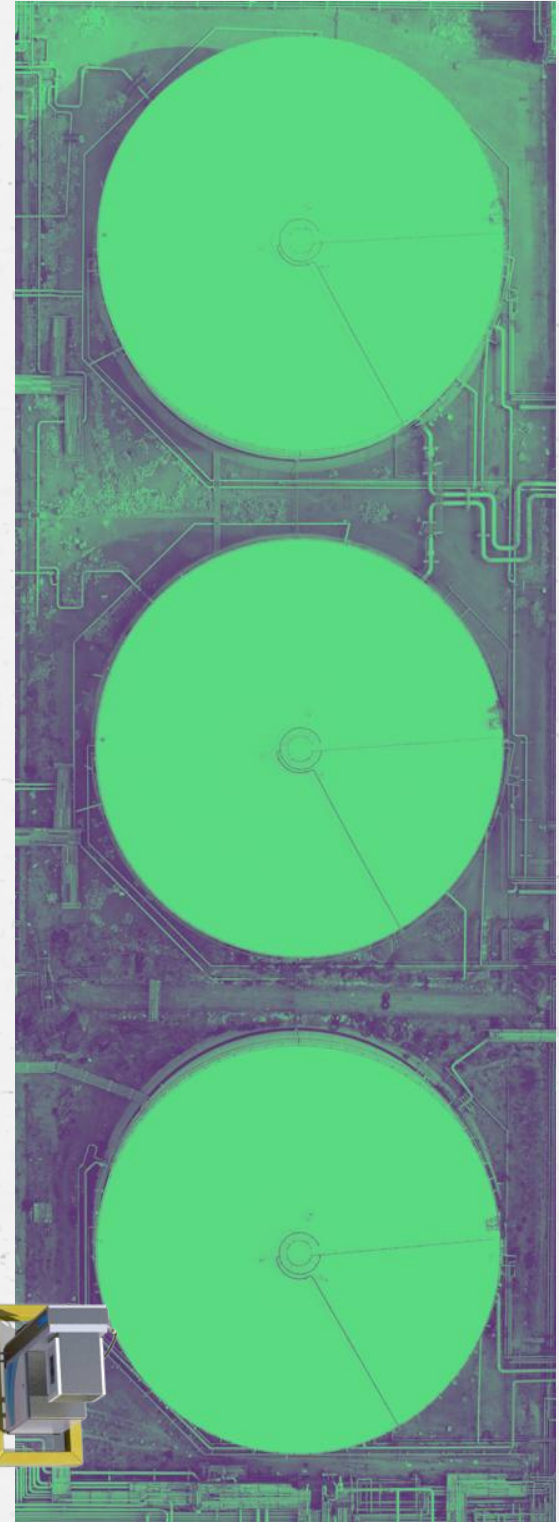
This year has witnessed the conclusion of exploration study of geothermal energy sources in the Kingdom, identifying and mapping areas with high potential for geothermal energy production. This achievement enabled the identification of the most suitable sites for the implementation phase of the geothermal energy initiative, connecting research findings with practical applications to support the Kingdom's drive to diversify its energy mix and enhance sustainability in order to achieve the Saudi Vision 2030 objectives.





Continued achievement of record-breaking low costs in Electricity Production

The (Najran, and Shuaibah 1) projects achieved global records for solar power generation costs, where the (Najran) project, with a capacity of (1,400 MW), recorded the world's second-lowest electricity generation cost at (1.09 US cents/kWh), following the (Shuaibah 1) project, with a capacity of (600 MW), which achieved a record-low cost of (1.04 US cents/kWh). Additionally, the (Aldawadmi, and Al-Ghat) projects achieved global records for wind power generation costs, where the (Aldawadmi) project, with a capacity of (1,500 MW), recorded the lowest wind power generation cost worldwide at (1.33 US cents/kWh), while the (Al-Ghat) project achieved the second-lowest cost globally at (1.57 US cents/kWh).



Sustainability Horizons

How are solar and wind data shaping the future of renewable energy?

The Geographic Survey for Renewable Energy Projects is a flagship NIDLP initiative and the first of its kind globally. It monitors and measures renewable energy sources across all regions of the Kingdom to accelerate project development, reduce costs, and build a comprehensive reference map for clean energy resources.

Scan to learn

About Geographic Survey Project
for Renewable Energy Projects





Mining Sector





The Kingdom's mining sector began to demonstrate clear signs of maturity with the launch of the Comprehensive Mining and Minerals Strategy. This strategy was built on three main pillars: first, increasing the discovery of the Kingdom's natural resources; second, improving the legislative environment of the sector; and third, linking the mining sector with the industry sector to maximize economic returns.



His Excellency Mr.
Bandar bin Ibrahim Alkhorayef
 Minister of Industry and Mineral
 Resources

Mining Sector's Strategic Directions aim to Maximize the Value Generated from the Sector by:



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



Creating job opportunities and nurturing national talent.



Providing essential geological data through the Arabian Shield geological survey, under the General Geological Survey Program.



Maximizing the added value of mineral resources by establishing value-added mining chains in collaboration with the private sector, to unlock new investment opportunities.



Enhancing user experience by improving services, delivering reliable digital data, improving accessibility, and reducing the time required to issue exploration licenses.



Increasing exploration spending to globally competitive levels by attracting private sector investments, supported by the Exploration Fund as part of sector-wide initiatives.

Our Objective

Maximize

value creation from the mining sector.



2030 Aspirations

Maximizing the contribution to GDP to reach

▶ **46.9** USD billion

Enhancing beneficiary experience by improving satisfaction with the services provided and reducing the detection license issuance period to

▶ **60** days

219,000 jobs

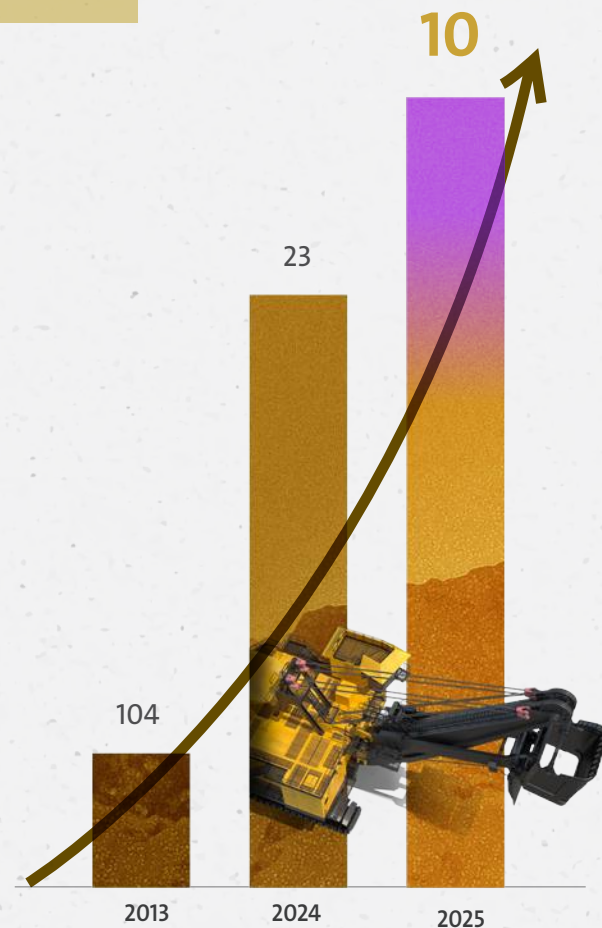
▶ The number of jobs to be created across the mining sector.

Top Achievements



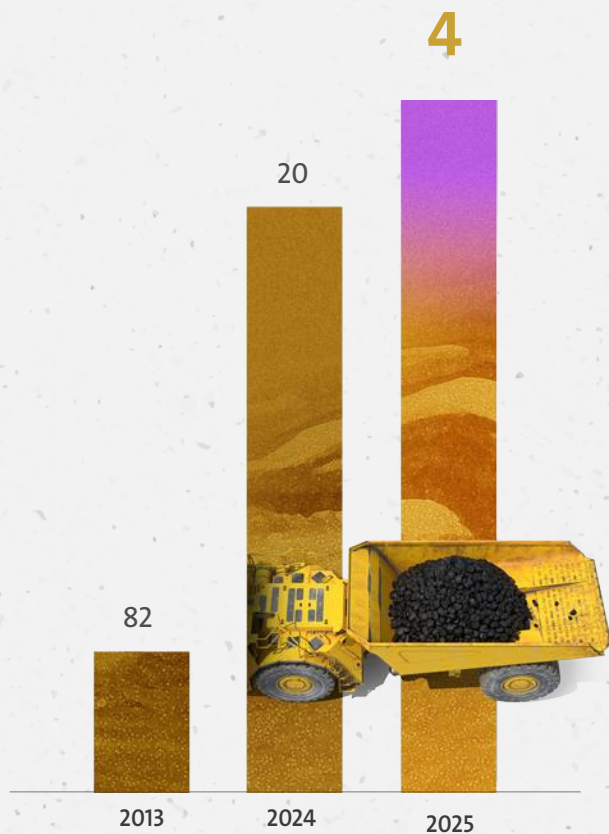
The Kingdom ranks among the world's top ten in mining investment attractiveness.

The Kingdom of Saudi Arabia continued its ascent in the Mining Investment Attractiveness Index, according to the 2025 Annual Survey of Mining Companies published by Canada's Fraser Institute. This achievement reflects the rapid transformation of the Saudi mining sector under the Saudi Vision 2030 objectives. It highlights the Kingdom's efforts in evolving its regulatory and legislative framework, accelerating geological exploration, developing mining databases, and boosting infrastructure and support services. Furthermore, it marks the successful rollout of initiatives and incentives that have sharpened the sector's competitiveness, establishing the Kingdom as a premier global destination for mining investments.



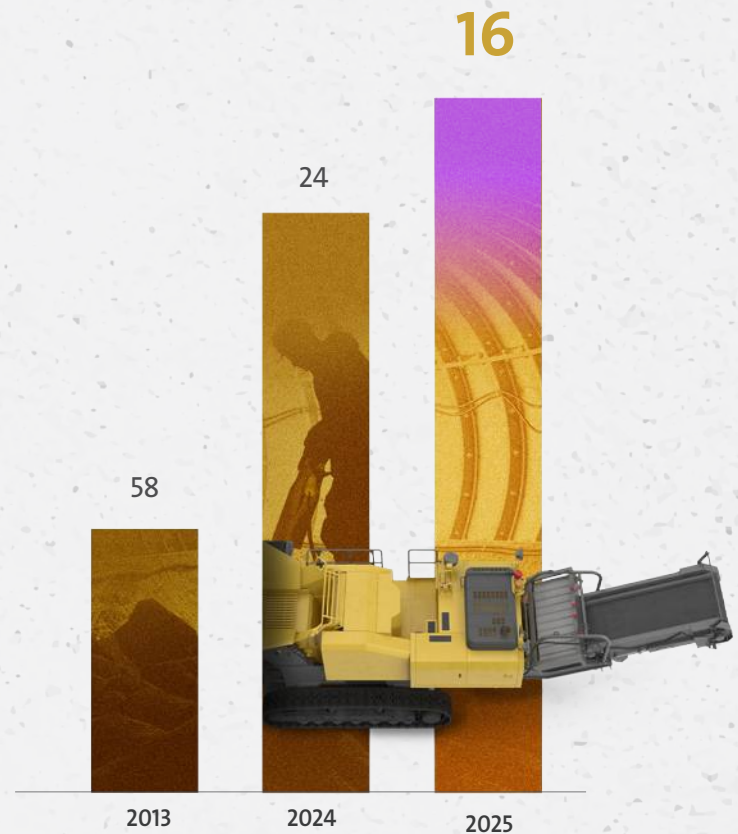
Investment Attractiveness Index

The Kingdom entered the list of the world's top ten countries, ranking tenth globally, achieving a leap of (94) positions compared to (2013), and advancing by (13) positions in just one year, reflecting the rapid growth in the competitiveness of the Saudi mining sector and its attractiveness to global investments.



Policy and Regulatory Index

The Kingdom advanced to 4th place globally, up from 20th place in 2024 and rising by 78 positions compared to 2013. This achievement reflects growing international confidence in the regulatory and legislative environment of the mining sector, as well as the heightened competitiveness of the Saudi mining investment sector.



Geological Potential Index

The Kingdom improved its global ranking from 58th in 2013 to 16th in 2025, following its ranking of 24th in 2024. This steady progress is driven by ongoing geological survey operations, the development of mining infrastructure, and development initiatives that have strengthened the sector's competitiveness.



National Industrial
Development and
Logistics Program

وزارة الصناعة
والتجارة المعدنية
Ministry of Industry and Mineral Resources



Bridge

Launch of BRIDGE Initiative to Attract International Startups in the Mining Sector

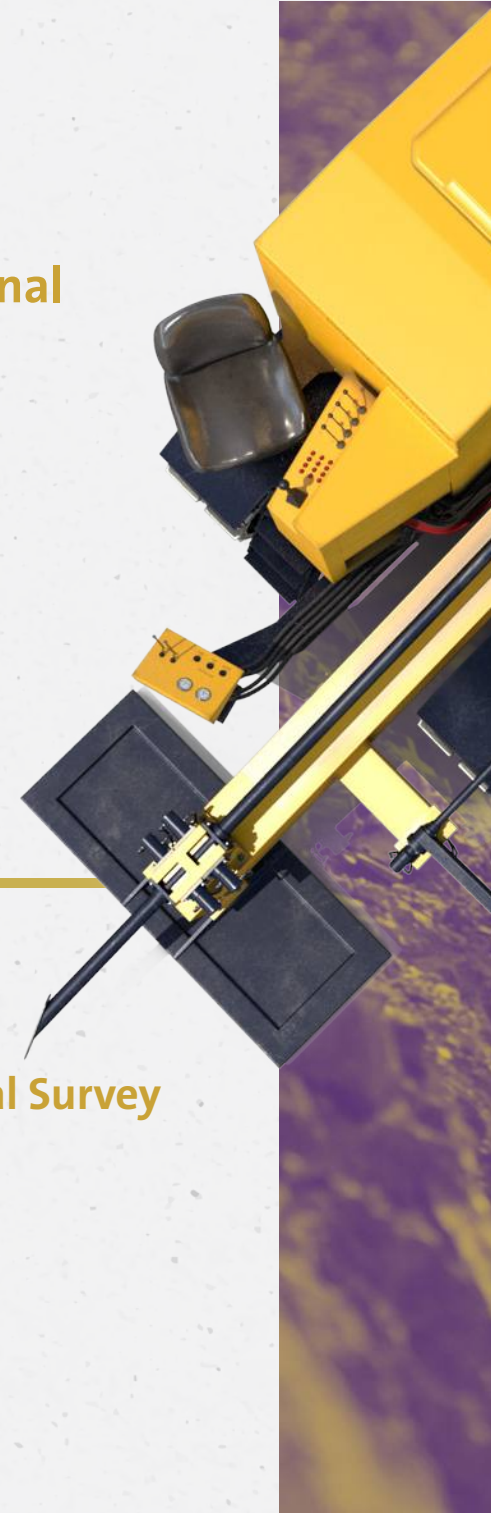
The BRIDGE Initiative was launched in partnership with the Ministry of Industry and Mineral Resources. This initiative forms a part of ongoing efforts to support innovation in mining technologies and enhance the Kingdom's attractiveness for international startups specializing in cutting-edge technologies. The BRIDGE initiative features the participation of (15) international startups focused on innovative technologies in the mining sector, represented by (28) founders, CEOs, and senior executives. This takes place within an intensive program conducted in Riyadh, which focuses on building strategic partnerships, stimulating investment opportunities, and supporting commercial expansion within the Kingdom's mining and investment ecosystem.



هيئة المساحة الجيولوجية السعودية
Saudi Geological Survey

Completion of Phase I targets of the General Geological Survey Program, Covering 65% of the Arabian Shield area

The Kingdom of Saudi Arabia continues its efforts to explore mineral wealth across the Arabian Shield, an area spanning (630,000 km²), within the framework of the General Geological Survey Program initiative, aiming to complete (65%) of the region's geological survey to provide accurate and reliable geological data for investors, thereby promoting mining investment and boosting the national economy.



وزارة الصناعة
 والثروة المعدنية
 Ministry of Industry and Mineral Resources



Issuance of Exploration Licenses for the Kingdom's First Mineralized Belts, Covering 4,788 km² across the Jabal Sayid and Al-Hajar Sites

Exploration licenses were awarded for the Kingdom's first mineralized belts at the Jabal Sayid site in Al-Madinah Region and the Al Hajar site in Aseer Region, covering a total area of (4,788 km²). The licenses were granted through a highly transparent and competitive bidding process involving both local and international companies. The awards included two licenses in the Jabal Sayid belt, covering an area exceeding (2,000 km²), and two licenses at the Al-Hajar site within the Wadi Shwas belt, covering (1,896 km²). These sites are characterized by abundant deposits of copper, gold, silver, lead, and zinc, supporting the Kingdom's transition from the exploration phase to building integrated value chains, while efforts continue to launch new opportunities across areas exceeding (13,000 km²) of promising mineral zones.



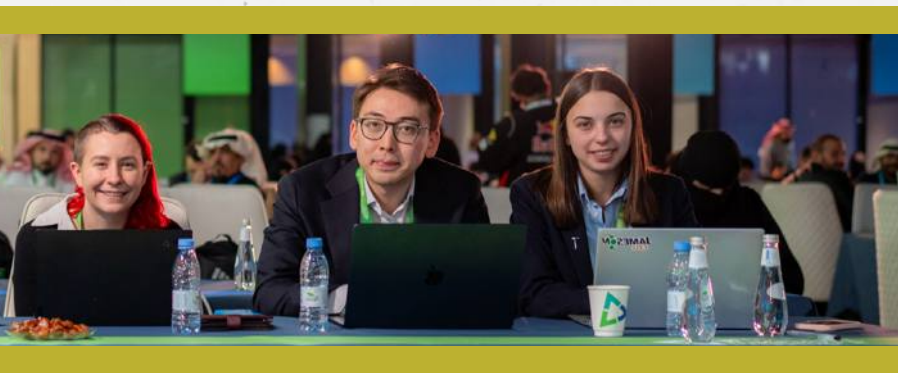
**FUTURE
MINERALS
PIONEERS**





A New Phase of Supporting Mining Innovation Through the Launch of a global minerals innovation competition

In a move that supports the sustainability of the mining sector in the Kingdom, the 1st edition of the Global Mining Innovation Competition was launched under the title “**Future Minerals Pioneers**” in partnership with the Ministry of Industry and Mineral Resources. The competition aims to develop practical solutions that enhance the sector’s future readiness by boosting national and international talent and enabling them to contribute to building an advanced innovation ecosystem that enhances the competitiveness of the mining sector.



This journey commenced with the national competition, featuring the participation of 35 national universities across 5 in-person bootcamps held across various regions of Saudi Arabia: The Western Region at King Abdulaziz University (KAU), the Northern Region at University of Hail, the Eastern Region at King Fahd University of Petroleum and Minerals (KFUPM), the Southern Region at King Khalid University, and the Central Region at Al-Yamamah University, preparing participants to advance to the global competition phases.

The competition journey extended from the application stage through the in-person bootcamp and concluded with the announcement and recognition of the winning teams during the fifth edition of the Future Mineral forum.

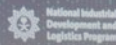


FUTURE MINERALS FORUM

INVESTMENT HUB

FUTURE MINERALS FORUM

VISION 2030
رؤية 2030
National Industrial Development and Logistics Program



Newlab

مؤتمر التعدين الدولي

Evolution of the Future Minerals Forum

2022

The Future of Minerals

2023

Mining Sector Developments in the Region Extending from Africa to West and Central Asia



32

Countries in the Ministerial Meeting for Ministers Responsible for Mining Affairs



63

Countries in the Ministerial Meeting for Ministers Responsible for Mining Affairs



6

Organizations (Governmental and Non-Governmental)



5

Memorandums of Understanding and Agreements



21

Organizations (Governmental and Non-Governmental)



60

Memorandums of Understanding and Agreements



136

Speakers



3+

Thousands Participants



249

Speakers



9

Thousands Participants

WELCOM

2024

Turning Discussions into Actions



75 Countries in the Ministerial Meeting for Ministers Responsible for Mining Affairs



35 Organizations (Governmental and Non-Governmental)



75 Memorandums of Understanding and Agreements



250 Speakers



14 Thousands Participants

2025

Confronting Challenges for a New Era of Development



90 Countries in the Ministerial Meeting for Ministers Responsible for Mining Affairs



50 Organizations (Governmental and Non-Governmental)



126 Memorandums of Understanding and Agreements



405 Speakers



18 Thousands Participants

LET TO F M F

National Treasures

From the Depths of the Earth to the Global Markets

Saudi phosphate is a national wealth transforming into added value that supports global food security, enhances the Kingdom's position in global supply chains, and establishes its presence as one of the world's most prominent producers and exporters of phosphate.

Scan to learn

About Saudi Arabia's phosphate resources





Industry Sector





The Kingdom's ambition to become a leading industrial Powerhouse regionally and globally, and for its products and services to earn the confidence of consumers, through fostering local talents and innovations, promoting national product, and enabling companies to expand their reach and market their products locally and internationally, in a manner that supports the national economy and its sustainability.



His Excellency Mr.
Bandar bin Ibrahim Alkhorayef
Minister of Industry and Mineral
Resources

Industry Sector Directions aim to Maximize the Value Generated from the Sector by:



Building a resilient, competitive and sustainable industrial economy driven by the private sector—one that positively impacts macroeconomic indicators. This involves expanding promising sectors such as pharmaceuticals, medical devices, and automotive, as well as oil and gas-related industries, including specialty chemicals, plastics, and rubber, alongside the defense sector. The strategy also includes fostering a competitive industrial environment through world-class infrastructure, transparent regulatory frameworks, and innovation ecosystems that support facilities of all sizes.



Protecting national industries from dumping and unfair competition by enhancing the quality of local products, enabling them to compete regionally and globally, which promotes the growth of promising industries and export capabilities.



Developing special enablers, such as establishing Special Economic Zones, enhancing the quality of economic and industrial cities, and continuously refining regulations and legislation to boost competitiveness and attract regional and global investments.



Localizing high-value industries that strengthen the national economy and enhance its resilience to global shocks. This includes industries where the Kingdom can lead at the regional or global level, while advancing industrial integration across the region.



Maximizing economic value by increasing local manufacturers contributions to government procurement, as well as to the capital and operational expenditures of state-owned industrial enterprises. This includes developing human capital, advancing workforce training, and attracting investments to localize strategic industries within the Kingdom.



Our Objectives

Develop

Oil and gas-adjacent industries.

Localize

Promising manufacturing industries.

Create

Special zones and rehabilitate economic cities.

Localize

Military Industries.

2030 Aspirations

Attaining the capacity to manufacture

280,000

Cars annually

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

Localizing

40%

of the pharmaceutical industry

Localizing (40%) of the market value in the pharmaceutical industry, and increasing the percentage of localized medical devices and supplies to 15%.

Meeting

85%

of the local demand for food industries.

Positioning the Kingdom as a regional center for food industries, meeting (85%) of the domestic demand for these industries, and enhancing the aquaculture sector's production capacity.

Localizing

50 %

of military and security spending

Achieving (50%) localization of the Kingdom's military and security spending.



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

70 %

of the supply chain

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

Top Achievements

وزارة الصناعة
والثروة المعدنية
Ministry of Industry and Mineral Resources



GACA
الهيئة العامة للطيران المدني
General Authority of Civil Aviation

Launching a 1.2 million m² Aviation Industries Cluster at Modon Oasis in Jeddah

The Ministry of Industry and Mineral Resources, in cooperation with the Saudi Authority for Industrial Cities and Technology Zones (MODON) and the General Authority of Civil Aviation (GACA), launched an aviation industries cluster in Jeddah covering an area of (1.2 million m²). This cluster aims to localize advanced technologies, strengthen aviation supply chains, and boost industrial competitiveness in the Kingdom. Moreover, this cluster aligns with the goals of the National Industrial Strategy (NIS), the Saudi Aviation Strategy (SAS), and the National Tourism Strategy, contributing to positioning the Kingdom's aviation sector as the leader in the Middle East and solidifying the Kingdom's status as a global air transport hub, with a capacity to accommodate (30 million) passengers, and a global air cargo hub with a capacity of up to (2 million) tons annually.



Launching the Multi-Story Factory Project at Dammam 1st Industrial City

The multi-story factories project was launched in Dammam First Industrial City as an integrated industrial environment comprising (78) industrial units distributed across 8 floors, with flexible spaces equipped with the latest technologies to support high-quality industrial activities. This project aims to empower entrepreneurs and SMEs by providing modern industrial units along with consulting and training services, thus strengthening local content and developing the national industrial sector.



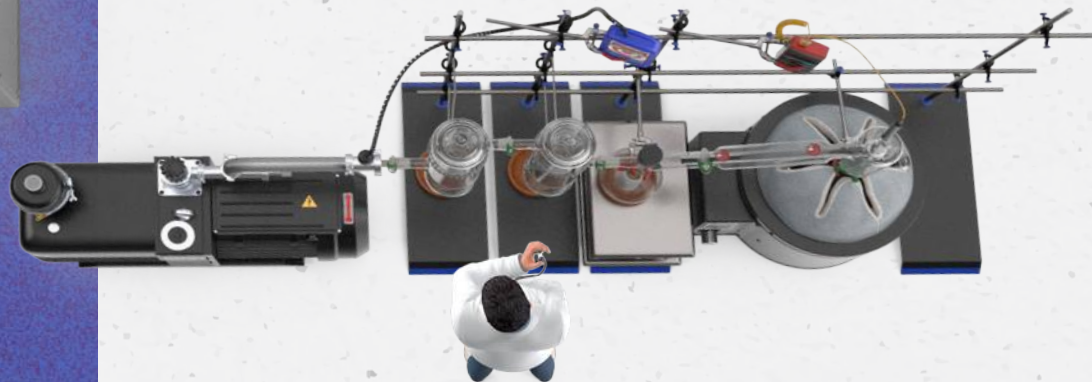
وزارة الصناعة
والثروة المعدنية
Ministry of Industry and Mineral Resources



MSpharma

Launching MS PHARMA's First Fully Integrated Biologics Manufacturing Facility in the Kingdom

In line with the objectives of the National Industry Strategy (NIS) to localize the pharmaceutical industry in the Kingdom, MS PHARMA's biologics manufacturing facility was launched at the Third Industrial City in Riyadh, as the Kingdom's first fully integrated biologics manufacturing facility on an area of (3,000 m²). The facility focuses on the production of medications for immune diseases, ophthalmic diseases, and osteoporosis.





Designating “King Salman Automotive Cluster” as the Official Name of the Cluster for Automotive Manufacturing Activities Located within King Abdullah Economic City (KAEC)

His Royal Highness Prince Mohammed bin Salman Al Saud, Crown Prince and Prime Minister, announced the designation of the “King Salman Automotive Cluster” as the automotive manufacturing cluster within KAEC SEZ. The Cluster aims to support economic diversification, increase non-oil GDP, and enhance exports by developing the automotive sector and sustainable transportation solutions, as well as localizing industrial and research capabilities. The Cluster hosts prominent local and international companies such as Ceer, Lucid Motors, and Hyundai Motor, and a joint venture with Pirelli. The Cluster is expected to contribute more than USD (24.5 billion) to non-oil GDP by 2035, while creating direct and indirect employment opportunities and strengthening local supply chains.



وزارة الصناعة
والثروة المعدنية
Ministry of Industry and Mineral Resources

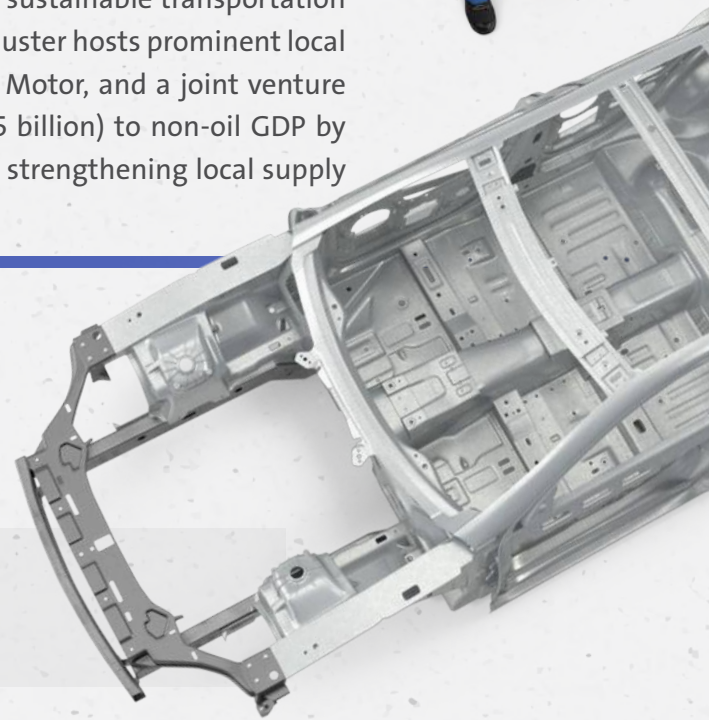


صندوق
الاستثمارات
العامة
PUBLIC
INVESTMENT FUND



Establishing the First Integrated Hyundai Motor Plant in the Kingdom to Enhance the Localization of the Automotive Industry

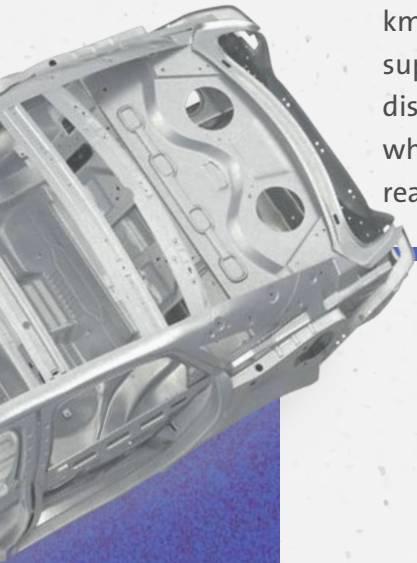
In partnership with the Public Investment Fund (PIF), the Ministry of Industry and Mineral Resources established an integrated manufacturing plant for Hyundai Motor Co. within the King Salman Automotive Cluster in King Abdullah Economic City. The project represents a strategic milestone that contributes to localizing the automotive industry, transferring knowledge, and enhancing local content. It features a production capacity of (50,000) vehicles annually, including both conventional and electric vehicles, and is projected to inject approximately USD (5 billion) into the national economy by (2045). Additionally, the project will strengthen supply chains and generate high-skilled job opportunities, reinforcing the Kingdom’s commitment to achieving Saudi Vision 2030 objectives and localizing advanced industries.





Launching Machinery and Equipment Industries Cluster to Support Localization and Enable the National Economy

The Ministry of Industry and Mineral Resources launched the Machinery and Equipment Industries Cluster at Dammam 3rd Industrial City on an area of (5 km²), with the aim of localizing specialized industries, enhancing efficiency of supply chains, and attracting high-value industrial investments. The Cluster is distinguished by its strategic location near King Salman Energy Park (SPARK), which strengthens its integration with manufacturing industries and supports realizing Saudi Vision 2030 goals in developing advanced industries.



Promising Industries



الهيئة العامة
للصناعات العسكرية
General Authority
for Military Industries



Localization of military industries rate rises to 24.89%, Progressing Toward the 50% Target by 2030

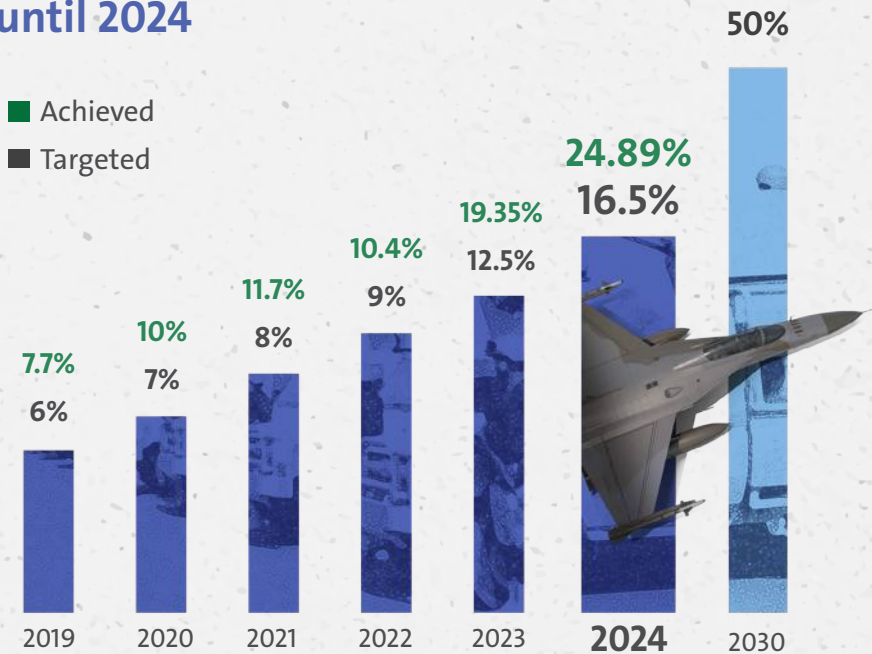
The localization of military industries rate increased to (24.89%) by the end of 2024, reflecting significant progress in the localization journey aimed at exceeding (50%) by 2030. This achievement represents a pivotal milestone in the development of the military industries sector, driven by ongoing efforts to issue a package of legislative enablers and incentives that strengthened the investment environment. This increase also marks a qualitative leap reflecting the national determination to build an independent military industries capable of meeting defense requirements locally.





Growth in Localization of Military Industries until 2024

■ Achieved
 ■ Targeted



Percentage of Local Content in Military Spending





GLOBAL INDUSTRY SUMMIT
21ST UNIDO GENERAL CONFERENCE
23-27 NOVEMBER 2025, RIYADH, SAUDI ARABIA
القمة العالمية للصناعة لمؤتمر اليونيدو العام 21

UNIDO 21st General Conference

UNIDO 21st General Conference is regarded as the leading international event for shaping the future of global industry. The Kingdom of Saudi Arabia hosted the conference in Riyadh from 23 to 27 November 2025, as a global platform bringing together heads of state, ministers, and experts to advance inclusive and sustainable industrial development. The Riyadh edition focused primarily on integrating innovation and AI into industrial processes, supporting the transition toward clean energy, and ensuring stability of global supply chains in a manner that serves the development objectives of member states.

The figures of the 21st General Conference of the United Nations Industrial Development Organization (UNIDO) in Riyadh reflect an exceptional scale of participation and impact:

173

UNIDO Member States

+150

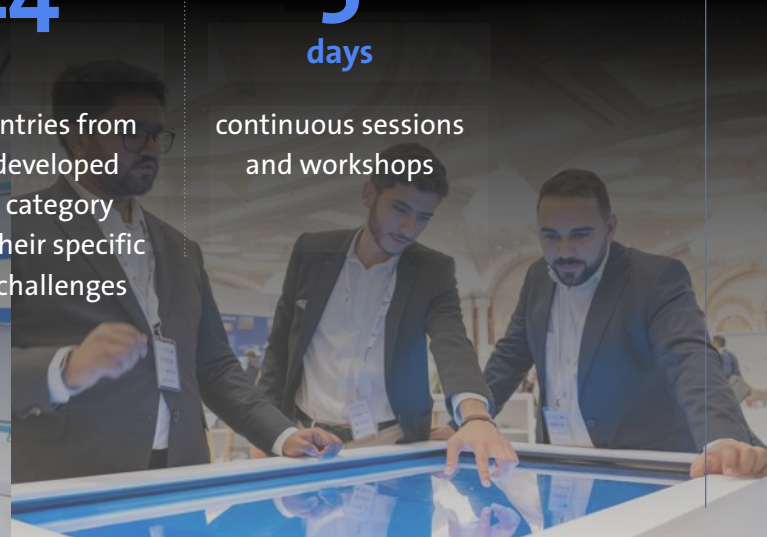
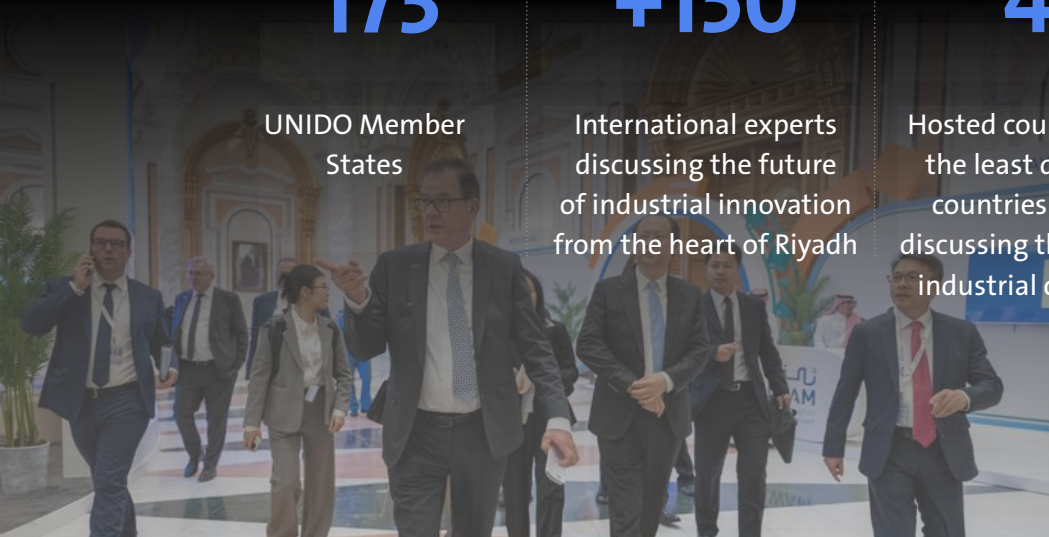
International experts discussing the future of industrial innovation from the heart of Riyadh

44

Hosted countries from the least developed countries category discussing their specific industrial challenges

5 days

continuous sessions and workshops



Industrial Leadership

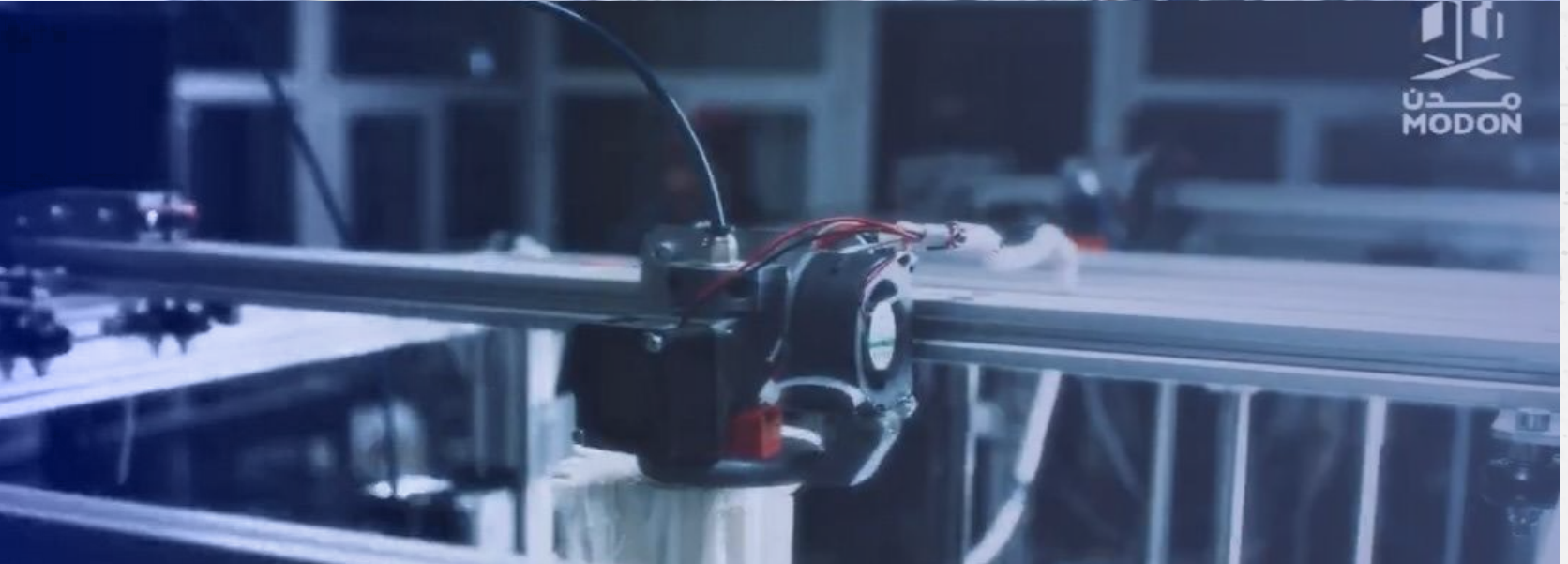
From Concept to Production Line

The Multi-Story Factory initiative is one of NIDLP initiatives, redefining the industrial environment through flexible production spaces, empowering entrepreneurs to innovate and manufacture efficiently, and creating a modern industrial model that supports business growth and enhances the competitiveness of national industry.

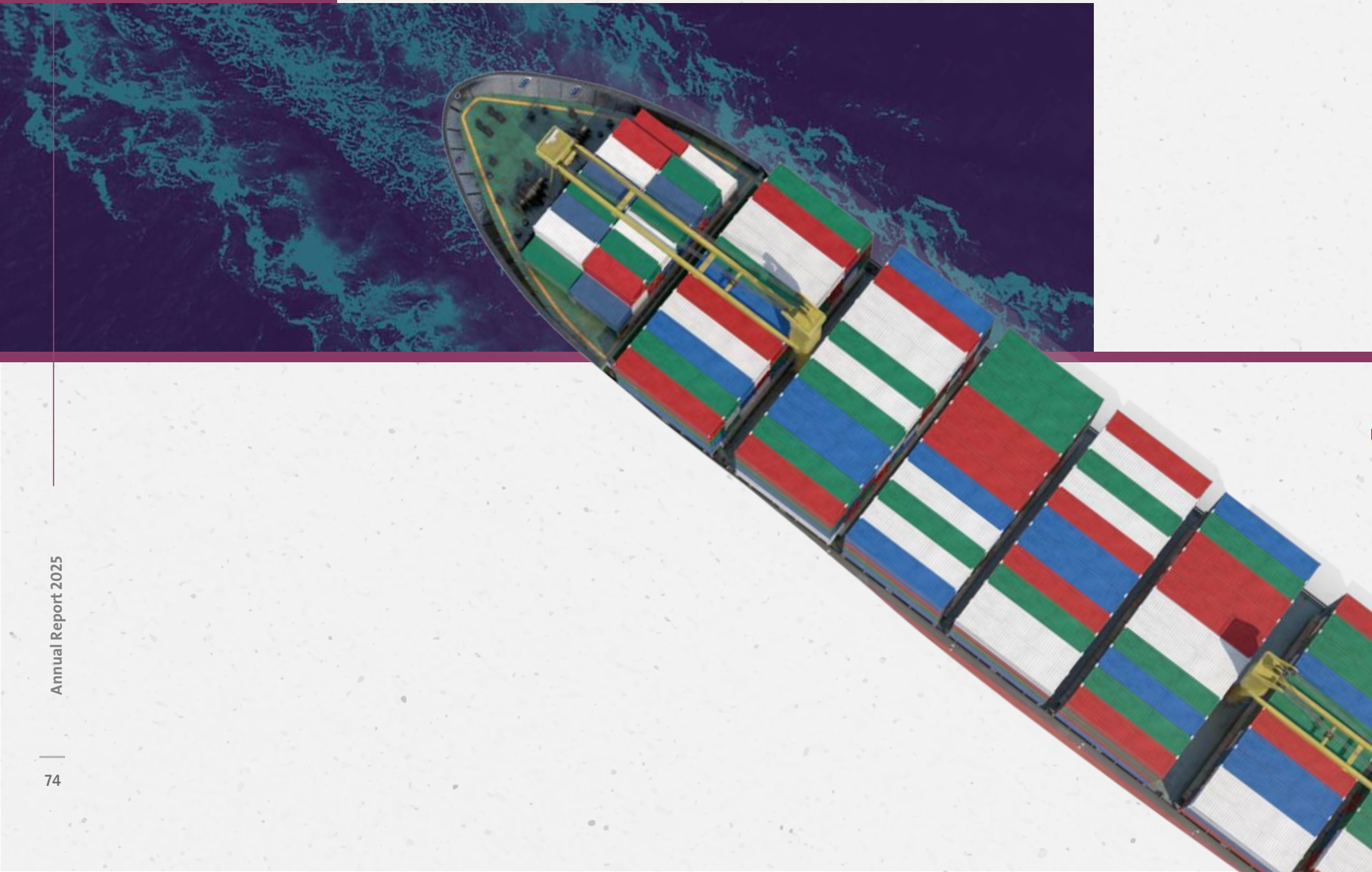
Scan to learn

About Dammam 1st Industrial City





Logistics Services Sector





The Kingdom's Transport and Logistics Sector continues to make rapid progress toward achieving the objectives of the National Transport and Logistics Strategy, which stems from the goals of Saudi Vision 2030. This progress is driven by the generous support of our wise leadership, may Allah protect them, and by effective collaboration between government entities and the private sector, along with clear strategic directions that are shaping the future of the transport and logistics sector.



His Excellency Eng.
Saleh bin Nasser Al-Jasser
 Minister of Transport and Logistics
 Services

Logistics Sector Directions aim to Maximize the Value Generated from the Sector by:



Strengthening Saudi Arabia's position as a global logistics hub by leveraging its strategic geographic location at the crossroads of trade routes connecting Asia, Europe, and Africa.



Excelling in multimodal transport integration by improving connectivity between sea, air, road, and railway networks to optimize goods and freight movement.



Investing in smart technologies (such as port automation and logistics infrastructure) to accelerate, facilitate, and increase operational efficiency.



Enhancing the logistics licensing process and regulatory framework to improve the ease of doing business.



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



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

Our Objectives

Create

and improve the performance of logistic hubs.

Improve

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

2030 Aspirations

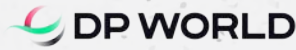
330 Million passengers

Number of passengers traveling through the Kingdom's airports.

Among the top **10** countries

The Kingdom's Ranking in the Logistics Performance Index.

Top Achievements



Launching the expansion of the South Container Terminal at Jeddah Islamic Port with USD 800 Million investment

To enhance operational capabilities and increase the handling capacity of Jeddah Islamic Port, the expansion of the South Container Terminal were launched with an investment value of USD (800 Million) through a partnership between the Saudi Ports Authority (Mawani) and DP World, utilizing the latest automation technologies to improve operational efficiency. The development included the adoption of advanced automation and digitization technologies to improve operational efficiency and reduce gate transaction times from two minutes to only 10 seconds, in addition to deploying AI technologies to analyze cargoes with greater accuracy and enhance operational efficiency.



Launching SAL Logistics Zone covering more than 1.5 Million square meters in Riyadh

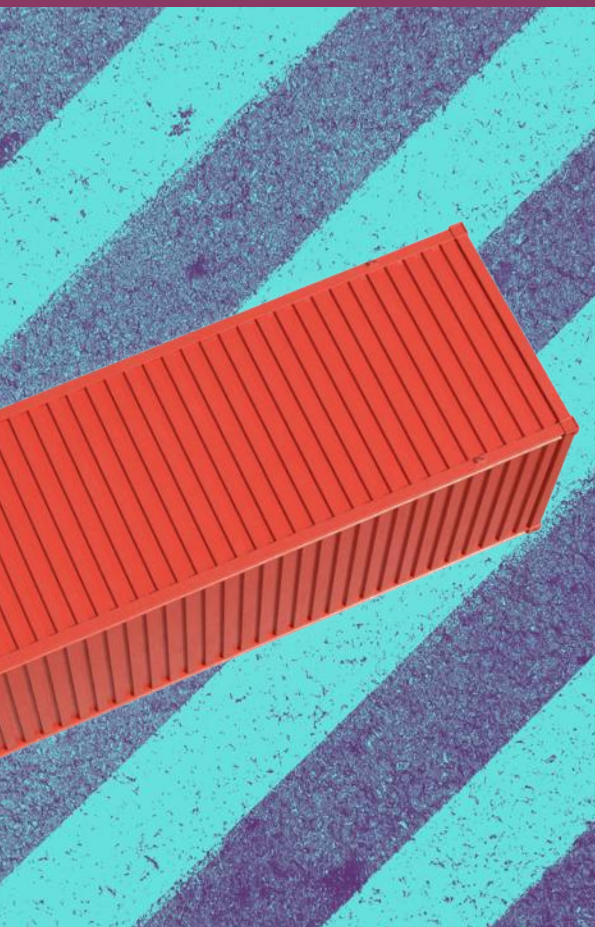
An agreement was signed between SAL Logistics and Sela to establish SAL Logistics Zone with an investment value of USD (1.1 billion), covering more than (1.5 million) square meters within the Falcon City project north of Riyadh. SAL Logistics Zone aims to enhance the efficiency of logistics services by utilizing the latest AI technologies. It also features a strategic location connecting various directions within the capital, which contributes to strengthening local and regional trade movement, supporting economic growth, and providing a modern and sustainable operating environment that keeps pace with developments in the Kingdom's logistics sector.





Inaugurating the first-of-its-kind Air Cargo Security Control Center

In a strategic step aimed at enhancing the efficiency of air cargo procedures in line with the latest security concepts, the General Authority of Civil Aviation (GACA) inaugurated the integrated Transit Cargo Inspection Center at King Abdulaziz International Airport, as part of a series of similar centers located at King Fahd International Airport in Dammam and King Khalid International Airport in Riyadh. The center is considered the first of its kind globally and contributes to strengthening the security framework of air cargo supply chains through remote inspection and monitoring technologies, with direct connectivity to all authorized air cargo agencies in the Kingdom. The center also enables unified centralized monitoring that contributes to accelerating decision-making and enhancing the efficiency of security procedures through the deployment of advanced technologies for risk analysis and the tracking of cargo movements from receipt until arrival at air gateways.



Launching “Future Mobility Sandbox” Project, Most Advanced of its Kind Globally

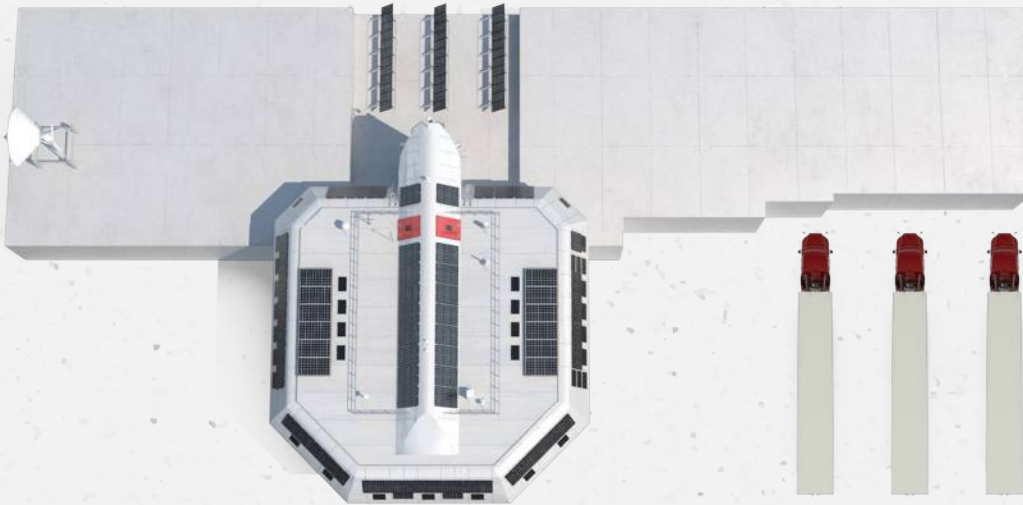
As part of the future of mobility initiative and through leveraging modern technologies and AI tools associated with logistics sector, the Kingdom launched the first integrated transportation testing platform, the “Future Mobility Sandbox”, on an area of (1.56 km)² within the KAUST’s campus. The project represents a unique platform for testing the latest innovations in land, air, and sea transport and constitutes a qualitative leap in the development journey of the Kingdom’s transport sector, with a global-reaching impact, aimed at developing and testing smart solutions that enhance the future of the Kingdom’s transport ecosystem.





Operation of the World's Longest ETCS Level 2 Railway Network to Enhance Economic and Logistics Connectivity

Operations commenced on the world's longest railway network utilizing the European Train Control System (ETCS) Level 2. Spanning more than 5,500 km, the network connects mines, ports, and stations across the Kingdom, strengthening its position as a global logistics hub and supporting the objectives of Saudi Vision 2030.



Saudi Arabia Railways Achieves Record Performance by Transporting (30 Million) Tons of Freight and More Than 14 Million Passengers

Saudi Arabia Railways (SAR) transported more than (30 million) tons of minerals and cargo, as well as more than (14 million) passengers during 2025, in an achievement underscoring SAR's commitment to supporting the objectives of the National Transport and Logistics Strategy and the aspirations of Saudi Vision 2030.

Saudi Arabia Wins Membership in IMO Council for 2026-2027 Term

As part of strengthening the Kingdom's presence as an influential force in shaping the future of the global maritime industry, the Kingdom of Saudi Arabia won membership in the Council of the International Maritime Organization (IMO) for 2026-2027 term after receiving (142) votes from member states. This achievement reflects the Kingdom's advanced standing in maritime sector, as the Saudi maritime fleet ranks first regionally, while the Kingdom's ports continue enhancing their global competitiveness, leveraging the Kingdom's strategic location, through (13%) of global trade passes via the Red Sea. This achievement also continues the Kingdom's ongoing influential role in developing international maritime regulations, supporting joint efforts to protect the marine environment, enhancing the safety and security of global maritime transport, and reflects the Kingdom's commitment to developing an advanced and sustainable maritime sector.

The Kingdom Receives the “Port Infrastructure” and “Logistics Hub” Awards

Saudi Ports Authority (Mawani) received the “Port Infrastructure” and “Logistics Hub” awards during the (TLME 2025) Awards 2025 ceremony, in recognition of its achievements in developing the infrastructure of Saudi ports and supporting logistics services sector. This achievement followed the implementation of the largest privatization contracts in the history of Saudi ports for developing and operating the North and South Container Terminals at Jeddah Islamic Port, in addition to the container terminals at King Abdulaziz Port, with investments exceeding USD (4.3 billion) and through strategic partnerships with private sector.

استثمر في السعودية
INVEST SAUDI

transport
logistic

Transport Logistic 2025

The Kingdom's participated in Transport Logistics 2025 exhibition in Munich - which is one of the world's most vital platforms for the transport and logistics services sector, bringing together major supply chain players, including corporations, ports, operators, and investment institutions. Such participation reflected a well-organized national presence driven by a partnership between the National Industrial Development and Logistics Program (NIDLP) and the "Invest Saudi" initiative, with the participation of (22) entities from the industry, transport, logistics sectors, and the Ministry of Investment. The participation focused on highlighting the development of infrastructure and logistics, along with recent legislative and regulatory developments that contribute to enhancing supply chain efficiency and strengthening the Kingdom's position as a logistics hub connecting three continents, while reinforcing its attractiveness as a competitive investment destination in global supply chains.

Saudi Participation Statistics

Participating Entities

22

Participating Entities
(Representing the investment, industry, transport, and logistics services)

Workshops

+25

Specialized Workshops

Investment Opportunities

+160

Opportunities

Strategic Meetings

+30

Strategic Meetings with
International Companies

signed

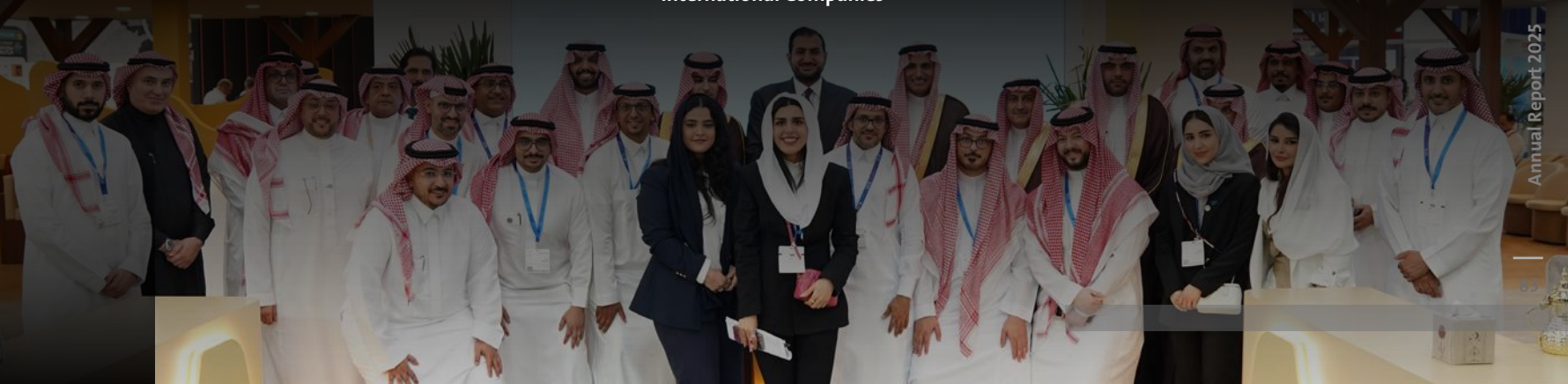
7

Agreements

Number of Visitors

8,000

Visitors to the Saudi Pavilion



Innovative Logistics

The Sandbox is Reshaping the Future of Transportation in the Kingdom

As one of NIDLP's initiatives, Future Mobility Sandbox was launched by the Ministry of Transportation & Logistics Services (MoTLS) in partnership with King Abdullah University of Science and Technology (KAUST) and in cooperation with the Ministry of Industry and Mineral Resources. It serves as the first regional testing environment of its kind, it enables the development and validation of future mobility solutions powered by AI and clean energy, within an integrated model that seamlessly connects land, air, and sea transport.

Scan to learn

About The Future Mobility Sandbox





Focus Area

Fourth Industrial Revolution





With the unwavering support and empowerment of His Royal Highness the Crown Prince—may Allah protect him—the Kingdom continues to seize 21st-century opportunities, solidifying its position as a global model in harnessing the Fourth Industrial Revolution, and reinforcing its position as a leading industrial powerhouse and a global logistics hub in line with the goals of the National Industrial Development and Logistics Program (NIDLP). Our youth remain the true wealth of our the nation, and through them the future is built, by way of technical innovation, adopting AI technologies, and building an integrated digital ecosystem tailored for the needs of the smart era.



His Excellency Eng.
Abdullah bin Amer Alswaha
Minister of Communications & In-
formation Technology

Fourth Industrial Revolution Focus Area Directions aim to Maximize Focus Area's Value by:



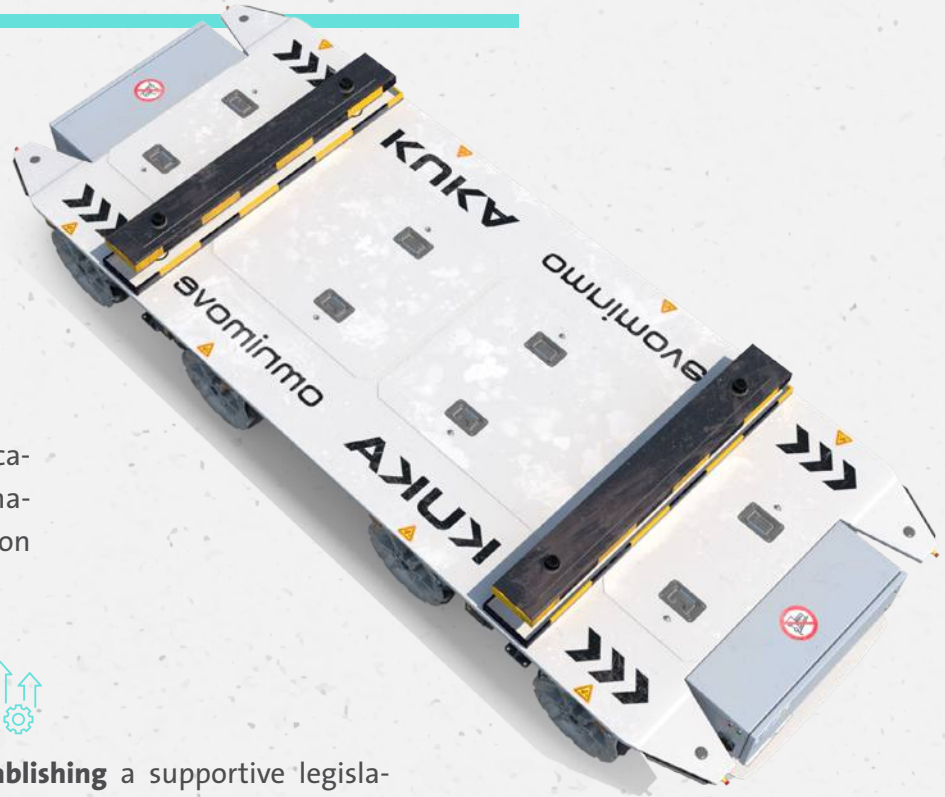
Developing the infrastructure of communications and digitalization technologies as a major enabler for the growth and diversification of 4IR applications in various fields.



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



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



Our Objective



Development

of the digital economy in facilitating the Fourth Industrial Revolution.

2030 Aspirations

—
Becoming a leading country in adopting and innovating new technologies.

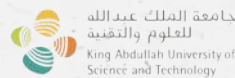
—
Increasing production efficiency, competitiveness, and sustainability enhancement.

5

—
National Capability Centers

for Fourth Industrial Revolution Technologies.

Top Achievements



Development of the Fastest Quantum Random Number Generator Enhances Digital Security and Supports Vital Industrial Applications

In a collaborative effort between King Abdulaziz City for Science and Technology (KACST) and King Abdullah University of Science and Technology (KAUST), the fastest Quantum Random Number Generator (QRNG) has been developed in accordance with international standards. The device successfully passed the randomness tests established by the National Institute of Standards and Technology (NIST), a premier international benchmark. The new generator features a generation rate approximately one thousand times faster than other quantum generators. This high generation rate was achieved through innovations in device manufacturing and post-processing algorithms. The design also integrates ultra-small micro-LEDs, which reduce power consumption and allow the device to be portable for various applications.

وزارة الصناعة
والثروة المعدنية
Ministry of Industry and Mineral Resources

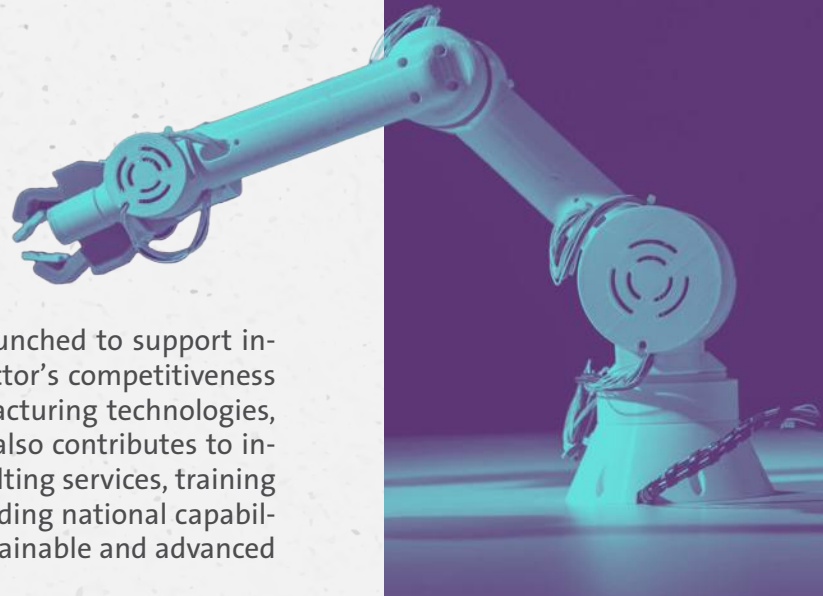


مركز التصنيع
والإنتاج المتقدم
Advanced Manufacturing and Production Center



Launch of the Advanced Manufacturing and Production Center to Enable Industrial Transformation in the Kingdom

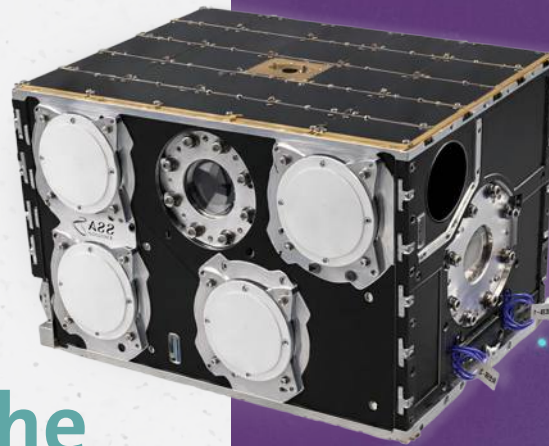
The Advanced Manufacturing and Production Center was launched to support industrial transformation in the Kingdom and enhance the sector's competitiveness regionally and globally. The center enables advanced manufacturing technologies, develops supply chains, and expands technology exports. It also contributes to industrial innovation and digital transformation through consulting services, training programs, and advanced manufacturing solutions, while building national capabilities in alignment with Saudi Vision 2030 goals toward a sustainable and advanced industrial economy.





Development of the First Saudi Satellite to Study Space Weather

As part of strengthening scientific and technical collaboration in the space sector, the Kingdom, represented by the Saudi Space Agency - signed an executive agreement with NASA to develop the first Saudi satellite dedicated to studying space climate, under the Artemis II mission. enabled by NIDL, this initiative aims to localize space technologies and boost local content in strategic industries, thereby contributing to global scientific research. The satellite is designed to collect precise data on solar activity and its effects on Earth's magnetosphere, enhancing astronaut safety and supporting the sustainability of communication systems and satellite networks.





3rd Saudi Forum for 4IR
2025: Frontiers of
Global Technology
By C4IR Saudi Arabia

The 3rd Forum for 4IR 2025: Frontiers of Global Technology

The Kingdom of Saudi Arabia hosted the 3rd Global Fourth Industrial Revolution Forum, organized by the Centre for the Fourth Industrial Revolution in Saudi Arabia (C4IR) in cooperation with the World Economic Forum. The forum witnessed remarkable international attendance from ministers, decision-makers, thought leaders, and major technology companies, aiming at strengthening the Kingdom's position as a global hub for innovation and AI applications. The forum's objectives focused on showcasing qualitative leaps in adopting future technologies, developing agile regulatory frameworks that support digital transformation, and activating public-private partnerships to accelerate the Kingdom's leadership in smart industries and the digital economy, in alignment with Saudi Vision 2030 objectives.

Statistics of the 3rd Saudi Forum for 4IR

Speakers

81

Speakers

Dialogue Sessions

26

Specialized Workshops

Agreements and
Partnerships

8

Executed

Professional Attendance

+2,300

Experts and Policymakers Attracted

Launched Initiatives

4

Regulatory Frameworks (Sandboxes)
for Testing Emerging Technologies
in the Saudi Market

Digital Transformation

A Center Leading Industrial Transformation

As an initiative of NIDL, the Advanced Manufacturing and Production Center was launched by the Ministry of Industry and Mineral Resources. It embodies the Kingdom's commitment to accelerating the adoption of Fourth Industrial Revolution technologies through a platform that brings together innovation with application, enables factories to transition toward smart manufacturing, and contributes to building a more efficient and globally competitive national industrial base.

Scan to learn

About Advanced Manufacturing
and Production Center





Focus

Area Local Content





Local content is no longer a mere procedural requirement, it has become a sovereign instrument to recirculate expenditure within the national economy. The Kingdom has succeeded in embedding local content policies as a core component of the national economy, through effective legislative instruments and executive projects led by the Local Content and Government Procurement Authority (LCGPA).



His Excellency Mr.
Bandar bin Ibrahim Alkhorayef
Minister of Industry and Mineral
Resources

Local Content focus area aim to maximize the focus area's value by:



Increasing local content in the national economy through establishing key targets and objectives at all levels, as well as embedding local content policies in governmental procurement activities.



Enhancing the local manufacturing and services sectors, as well as employment and human capital training. This is achieved through domestic and foreign direct investment and the localization of emerging and new technologies to strengthen the resilience of the industrial economy.



Maximizing the share of local manufacturers and service providers in the procurement, capital and operating expenses.



Our Objectives

Enhancing

Localization of oil and gas sector.

Increase

The percentage of local content in non-oil sectors.

2030 Aspirations

Increasing local content targets in Energy sector to reach

75%

by 2030

Maximizing the national economy's added value by increasing the local content share in the energy sector to (75%) by 2030, to boost the contribution of local manufacturers and service providers in capital and operational expenditures, develop human capital, and attract investments to localize key sector industries.



Top Achievements

هيئة المحتوى المحلي
والمشتريات الحكومية
Local Content & Government
Procurement Authority



'TORAY'

Launch of the Largest Reverse Osmosis Membrane Manufacturing Plant in the Middle East with an Annual Capacity of 300,000 Membranes

The manufacturing facility of Toray Membrane Middle East Co.Ltd. for reverse osmosis (RO) membranes was inaugurated in the Third Industrial City in Dammam. It is the largest facility of its kind in the Middle East, with an annual production capacity of (300,000) membranes. The plant encompasses all stages of the manufacturing process, contributing to the localization of use RO membrane production, strengthening local supply chains, facilitating the transfer of advanced knowledge and technologies, supporting national talent development, and advancing the Kingdom's economic and industrial development objectives.





Increasing the Mandatory List of National Products with 449 new national products

The Local Content and Government Procurement Authority continued updating the Mandatory List of National Products throughout 2025 by adding (449) new national products across several sectors, including construction, pharmaceuticals and medical preparations, medical supplies, food and agricultural products, furniture, chemicals and fertilizers, information technology, cybersecurity, transportation and logistics, consumer products, and other vital sectors. These updates increased the total number of products on the Mandatory List to (1670) national products. During 2025, 212 national factories benefited from the list, while the total number of tenders covered by the Mandatory List reached (38.175), with a value exceeding USD (13.5 billion). These efforts contribute to enhancing the competitiveness of national industries and increasing the contribution of local content in government procurement



Local Content Share in Government Procurement reached 51.2%

The share of local content in government procurement increased to (51.2 %) by the third quarter of 2025, compared to (33.7%) in 2020, reflecting continued efforts to strengthen local content and develop national capabilities. This progress contributes to diversifying the national economy, reducing reliance on imported products, and supporting the development of a strong and sustainable economy built on national talent and capabilities.





هيئة المحتوى المحلي
والمشتريات الحكومية
Local Content & Government
Procurement Authority



جائزة المحتوى المحلي
Local Content Award



Statistics for the Local Content Award - Fourth Edition Content Award

The fourth edition of the Local Content Award served as a primary driver for developing national purchasing power and stimulating economic sectors to adopt and localize supply chains. The award recognizes leading national models across government entities, private sector organizations, state-owned enterprises, non-profit institutions, and individuals who have made significant contributions to strengthening the national economy. Moreover, this edition focused on raising awareness about local content, increasing compliance with local content requirements, and enhancing competitiveness among economic segments, in line with Saudi Vision 2030 aspirations to increase local content's contribution to GDP.



Statistics of the Fourth Edition of the Local Content Award

2025 - Fourth Edition

724	5	22	27	5
Applicants	Competitive Pillars	Awards	Winners	Certifications

2024 - Third Edition

312	5	21	26	5
Applicants	Competitive Pillars	Awards	Winners	Certifications

2023 - Second Edition

280	4	20	23	3
Applicants	Competitive Pillars	Awards	Winners	Certifications

2022 - First Edition

247	3	11	18	7
Applicants	Competitive Pillars	Awards	Winners	Certifications

National Capabilities

From Importing to Localization

Localizing reverse osmosis membrane industry in partnership with NIDLP to develop national technologies that support water security, strengthen local content in supply chains, and build advanced industrial capabilities in one of the most vital sustainability sectors.

Scan to learn

about the Toray
Membrane Factory







Attracting

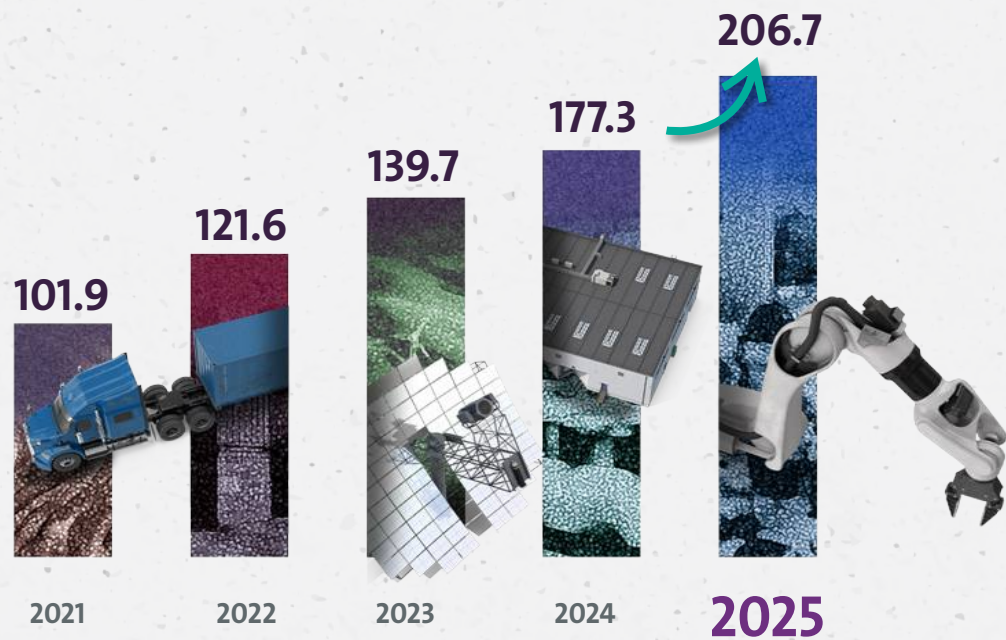
Investments



وزارة الاستثمار
Ministry of Investment

استثمر في السعودية
INVEST SAUDI

Total Achieved Non-Government Investment in NIDLP's Sectors (cumulative) (USD billion)



+29.3
USD Billion

Additional investments were
achieved in 2025

Key Investments



+27.2
(USD Billion)

The volume of investments in renewable energy projects reached approximately USD (+27.2 billion), while the total capacities of the projects for which Power Purchase Agreements PPAs were signed exceeded (43 GW).



+1.3
(USD Billion)

The General Authority of Civil Aviation (GACA) enabled the development of several projects for Matarat Company, Riyadh Airports Company (RAC), Dammam Airports Company, Jeddah Airports Company (JEDCO), Cluster2 Airports Company, and Ti-bah Airports Company, with a value exceeding USD (+1.3 billion).



+933
(USD Million)

The Saudi Ports Authority (Mawani) facilitated investments exceeding USD (+933 Million), including private sector participation contracts for multi-purpose cargo terminals on the Eastern and Western coasts with national partners.



+8.53
(USD Billion)

Attracting industrial investments with a value exceeding USD (+8.53 billion) across all industrial cities.



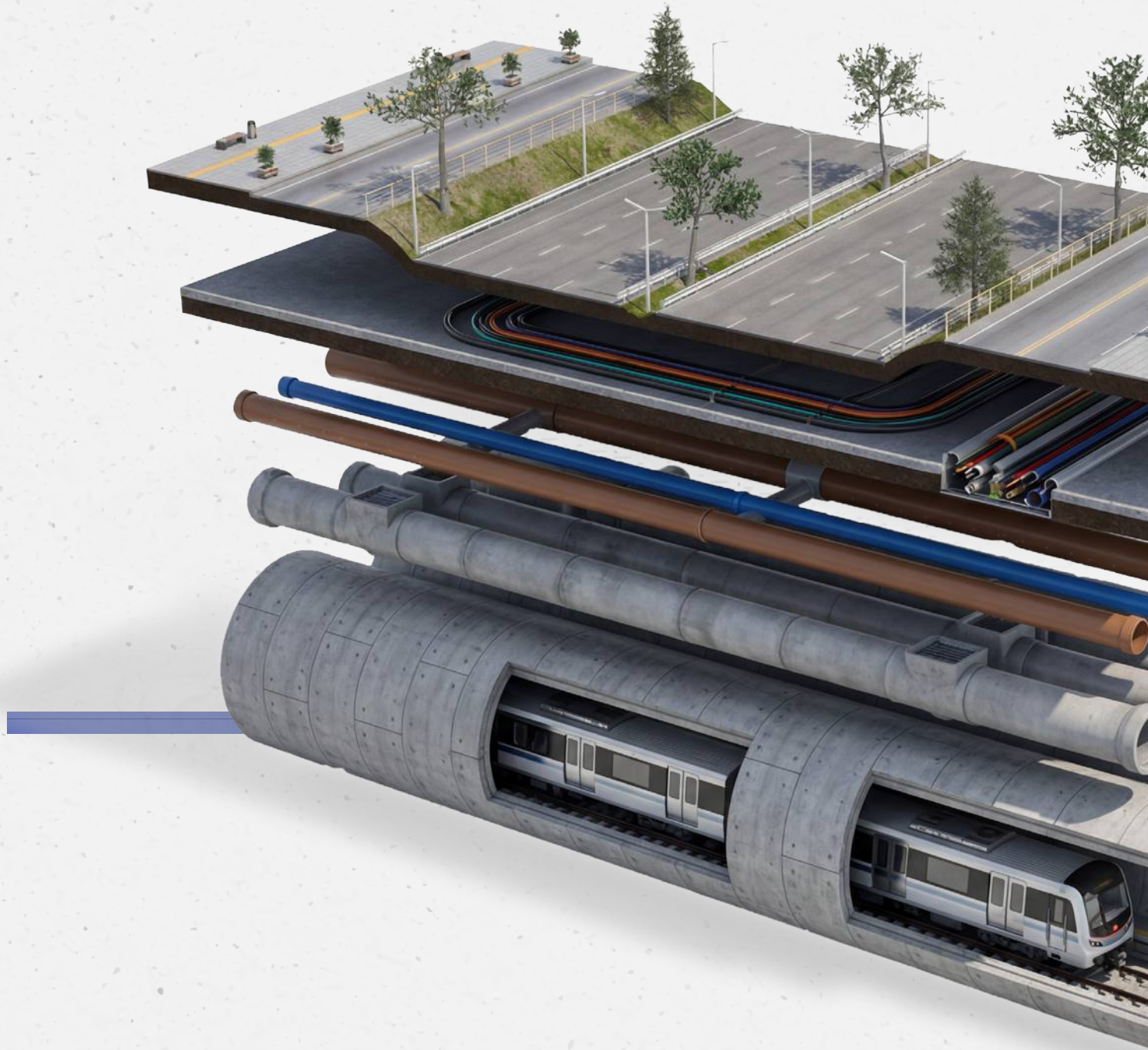
+2.0
(USD Billion)

Allocating industrial lands that contributed to attracting investments with a value exceeding USD (+2.0 billion) for several strategic projects.



+68
(USD Billion)

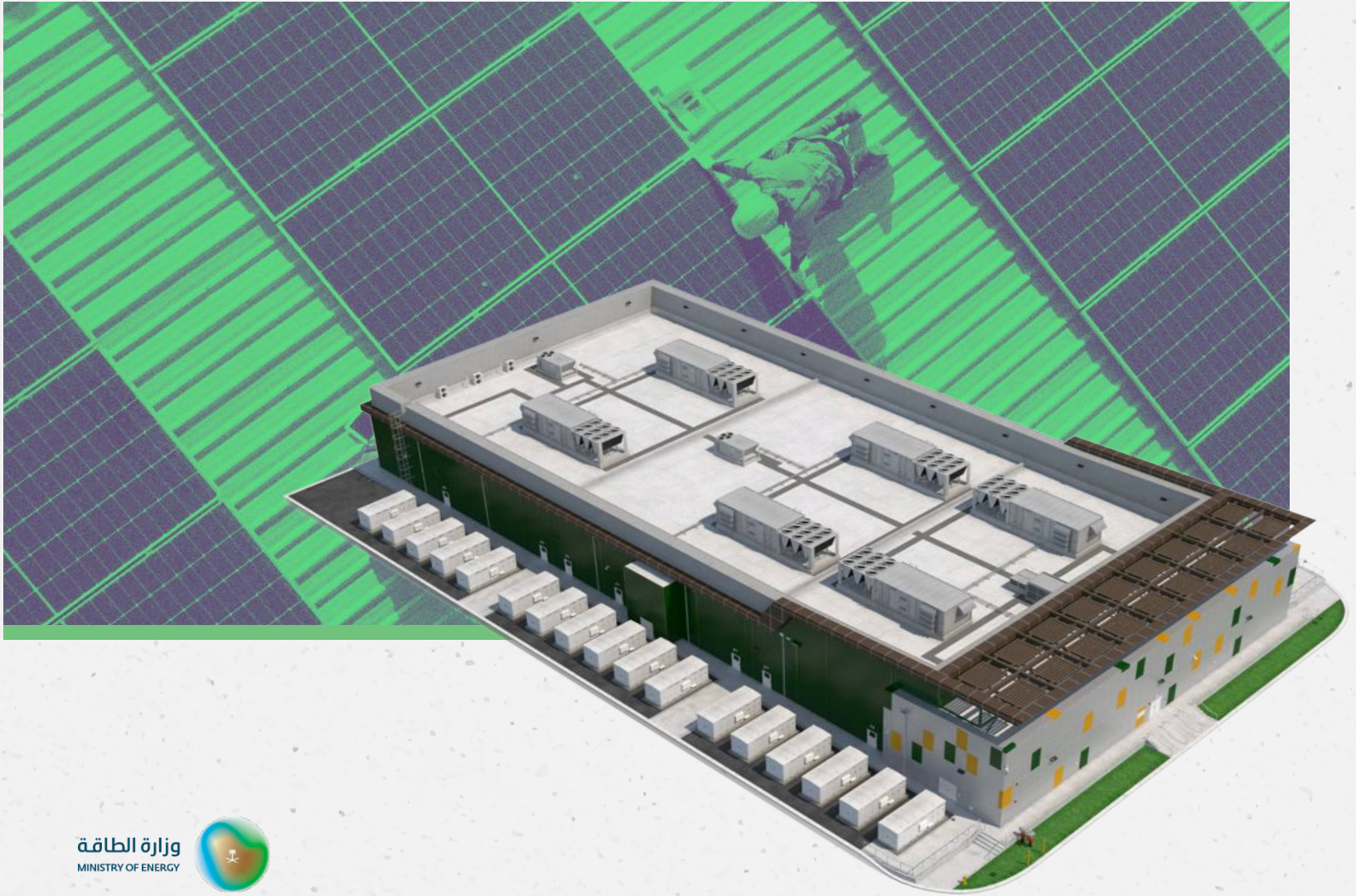
The Economic Cities and Special Zones Authority (ECZA) contributed to attracting investments by allocating developed lands and providing logistics services.





Integrated

Infrastructure



Continued Record-Breaking Low Electricity Production Costs

The (Najran, and Shuaibah 1) projects achieved global records for solar power generation costs, where the (Najran) project, with a capacity of (1,400 MW), recorded the world's second-lowest electricity generation cost at (1.09 US cents/kWh), following the (Shuaibah 1) project, with a capacity of (600 MW), which achieved a record-low cost of (1.04 US cents/kWh). Additionally, the (Dawadmi, and Al-Ghat) projects achieved global records for wind power generation costs, where the (Dawadmi) project, with a capacity of (1,500 MW), recorded the lowest wind power generation cost worldwide at (1.33 US cents/kWh), while the (Al-Ghat) project achieved the second-lowest cost globally at (1.57 US cents/kWh).



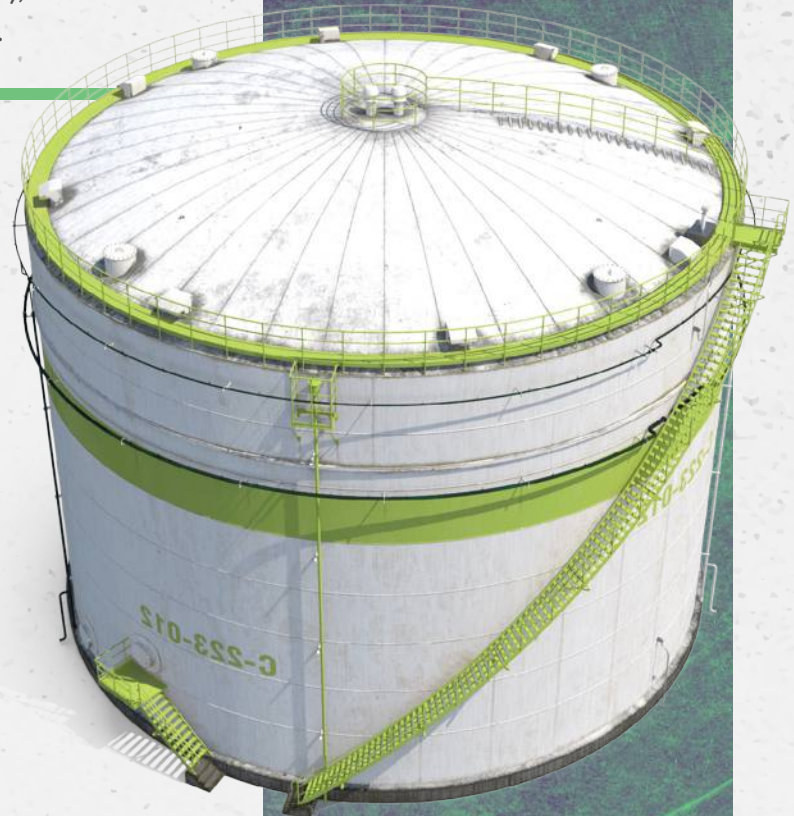
Commercial Operation of Several Solar Energy Projects with a Total Capacity of Approximately 15.8 GW

Commercial operation commenced for solar energy projects under the National Renewable Energy Program in each of (Saad 2, Wadi Al-Dawasir, Al-Kahfah, Ar Rass 2, and Al-Khunayqiyah 1), with a total capacity of approximately (15.8GW). This increased the total capacities covered by signed Power Purchase Agreements PPAs to more than (43GW), with the total tendered capacities reaching approximately (63.8 GW).



Developing Electronic Services in light of the Law of Trade in Petroleum Products

Implementation of the Electronic Services Development Project for Petroleum Products Trading to regulate and facilitate services for the end user This project will enhance the level of enhance the level of services provided to beneficiaries through the activation of the provisions of the Petroleum Products Trading Law, in order to regulate and monitor all aspects of commercial activities related to petroleum products trading, whether in the activities of use, sale, transportation, storage, distribution, import, or export, and to issue the licenses and permits required for beneficiaries to carry out these activities.



وزارة الصناعة
والتجارة المعدنية
Ministry of Industry and Mineral Resources



GACA
الهيئة العامة للطيران المدني
General Authority of Civil Aviation



Launching the Aviation Industries Cluster in Jeddah over 1.2 million sqm

The Ministry of Industry and Mineral Resources, in cooperation with the Saudi Authority for Industrial Cities and Technology Zones (MODON) and the General Authority of Civil Aviation (GACA), launched an aviation industries cluster in Jeddah covering an area of (3 million m²). This cluster aims to localize advanced technologies, strengthen aviation supply chains, and boost industrial competitiveness in the Kingdom. Moreover, this cluster aligns with the goals of the National Industrial Strategy (NIS), the Saudi Aviation Strategy (SAS), and the National Tourism Strategy, contributing to positioning the Kingdom's aviation sector as the leader in the Middle East and solidifying the Kingdom's status as a global air transport hub, with a capacity to accommodate (30 million) passengers, and a global air cargo hub with a capacity of up to (2 million) tons annually.



Launching the Multi-Story Factory Project at Dammam 1st Industrial City

The multi-story factories project was launched in Dammam First Industrial City as an integrated industrial environment comprising (78) industrial units distributed across 8 floors, with flexible spaces equipped with the latest technologies to support high-quality industrial activities. This project aims to empower entrepreneurs and SMEs by providing modern industrial units along with consulting and training services, thus strengthening local content and developing the national industrial sector.





Launching Machinery and Equipment Industries Cluster to Support Localization and Enable the National Economy

The Ministry of Industry and Mineral Resources launched the Machinery and Equipment Industries Cluster at Dammam 3rd Industrial City on an area of (5 km²), with the aim of localizing specialized industries, enhancing efficiency of supply chains, and attracting high-value industrial investments. The Cluster is distinguished by its strategic location near King Salman Energy Park (SPARK), which strengthens its integration with manufacturing industries and supports realizing Saudi Vision 2030 goals in developing advanced industries.



Laying the Foundation Stone for an Integrated Logistics Zone and Inaugurating the Second Container Terminal Expansion at King Abdulaziz Port in Dammam

The foundation stone was laid for an integrated logistics zone at King Abdulaziz Port in Dammam, alongside the inauguration of the new expansion of the second container terminal, with private sector investments exceeding USD (746.7 Million). These projects enhance operational efficiency, increase the port's capacity, and strengthen supply chains. They also reinforce the port's position as a global trade and logistics hub serving national industries and trade movement, supporting the objectives of Saudi Vision 2030 by developing infrastructure, increasing competitiveness, and attracting solid investments.



Laying the foundation stone for the new logistics corridor connecting Jeddah Islamic Port to the logistics zone in Al Khumrah.

As part of Saudi Arabia's efforts to enhance logistics efficiency and improve transport infrastructure, a new 17 km logistics corridor has been launched, which in directly linking Jeddah Islamic Port to Al-Khumra logistics zone in southern Jeddah. The project is expected to serve more than (8.000) trucks daily through a direct connection to Jeddah Islamic Port, the Kingdom's largest seaport, which handles approximately (75%) of the Kingdom's total imports and exports. The project is critical and is set to enhance the smooth flow of trade and strengthen supply chain efficiency.



Operation of the World's Longest ETCS Level 2 Railway Network to Enhance Economic and Logistics Connectivity

Operations commenced on the world's longest railway network utilizing the European Train Control System (ETCS) Level 2. Spanning more than (5,500 km) the network connects mines, ports, and stations across the Kingdom, strengthening its position as a global logistics hub and supporting the objectives of Saudi Vision 2030.



Saudi Arabia Railways Achieves Record Performance by Transporting 30 Million of ferights and More Than 14 Million Passengers

Saudi Arabia Railways (SAR) transported more than (30 million) of Freight of minerals and cargo, as well as more than 14 million passengers during 2025, in an achievement underscoring SAR's commitment to supporting the objectives of the National Transport and Logistics Strategy and the aspirations of Saudi Vision 2030.



Launch of the Advanced Manufacturing and Production Center to Enable Industrial Transformation in the Kingdom

The Advanced Manufacturing and Production Center was launched to support industrial transformation in the Kingdom and enhance the sector's competitiveness regionally and globally. The center enables advanced manufacturing technologies, develops supply chains, and expands technology exports. It also contributes to industrial innovation and digital transformation through consulting services, training programs, and advanced manufacturing solutions, while building national capabilities in alignment with Saudi Vision 2030 goals toward a sustainable and advanced industrial economy.

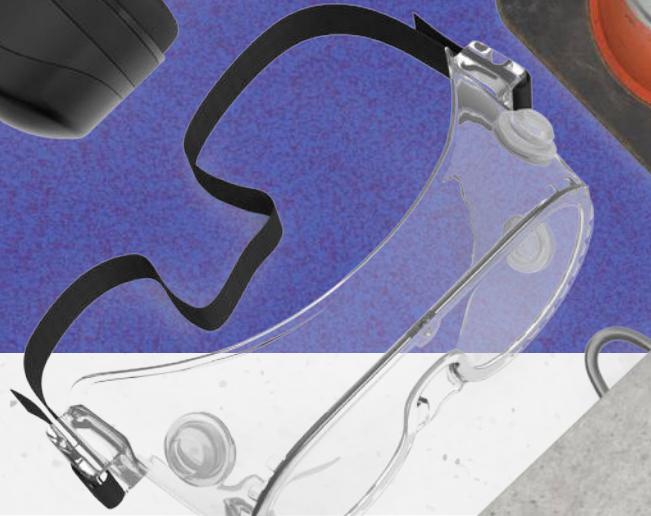


Inauguration of industrial and logistics projects valued at more than USD 121.3 million

A number of industrial, logistics, and A number of industrial, logistics and development projects have been inaugurated and their foundations laid in the Industrial City of Madinah, with a total value exceeding USD (121.3 million). The projects included the inauguration of three infrastructure development projects worth over USD (97.87 million), the launch of (16) new warehouses as part of a larger project comprising (46) warehouses, and the laying of the foundation stone for the construction of (20) ready-built factories, each with an area of (1500 m²). Additionally, a "humanization of the industrial city" project was announced, with a budget exceeding USD (5.9 million).

Improvement of Regulations

and Legi



islations



Developing Electronic Services in light of the Law of Trade in Petroleum Products

Implementation of the Electronic Services Development Project for Petroleum Products Trading to regulate and facilitate services for the end user This project will enhance the level of services provided to beneficiaries through the activation of the provisions of the Petroleum Products Trading Law, in order to regulate and monitor all aspects of commercial activities related to petroleum products trading, whether in the activities of use, sale, transportation, storage, distribution, import, or export, and to issue the licenses and permits required for beneficiaries to carry out these activities.

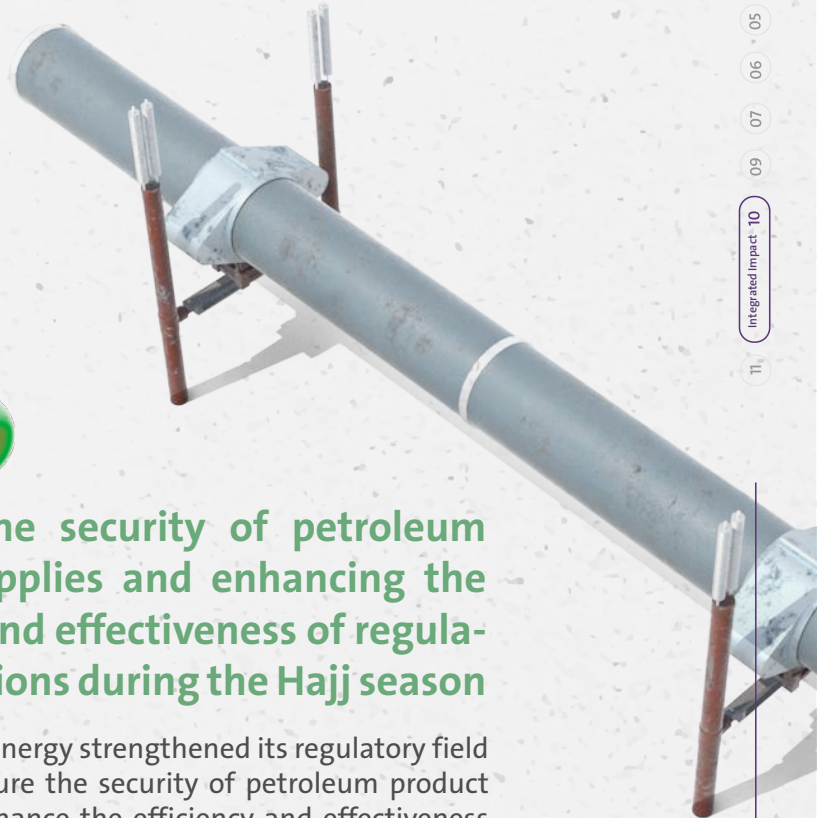
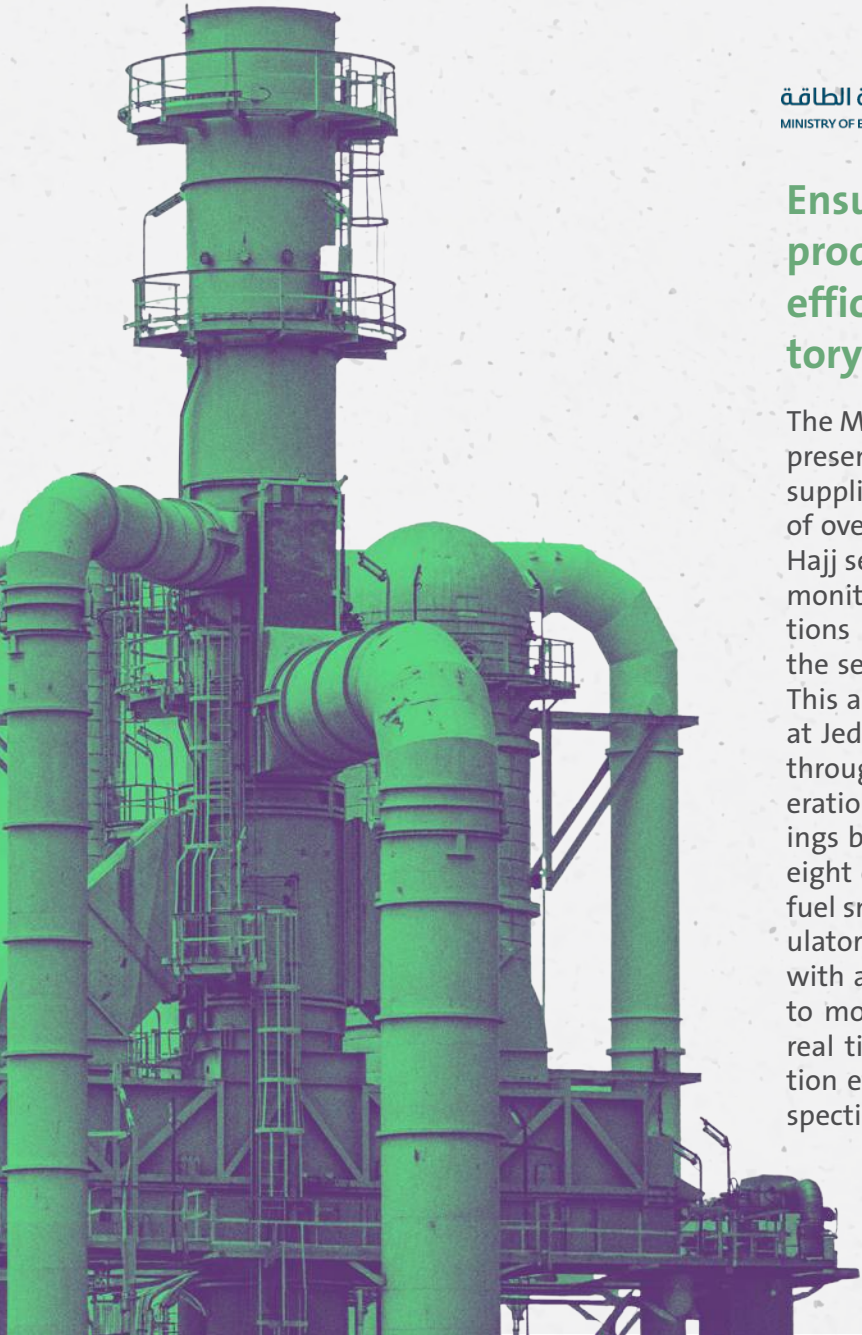


وزارة الطاقة
MINISTRY OF ENERGY



Ensuring the security of petroleum product supplies and enhancing the efficiency and effectiveness of regulatory operations during the Hajj season

The Ministry of Energy strengthened its regulatory field presence to ensure the security of petroleum product supplies and enhance the efficiency and effectiveness of oversight operations across the Kingdom during the Hajj season of 1446AH. This was achieved through daily monitoring and field and desk inspections of fuel stations and service centers in the region, and verifying the security and reliability of petroleum supply chains. This also included maintaining jet fuel inventory levels at Jeddah and Madinah airports at no less than (80%) throughout the season. In addition, field regulatory operations were intensified within cities and border crossings by increasing the presence of inspection teams at eight customs entry points to reduce the risk of illegal fuel smuggling. Furthermore, a digital platform for regulatory operations management was launched, along with an upgraded petroleum materials tracking center to monitor tanker movements across the Kingdom in real time. This significantly improved resource utilization efficiency and increased the target number of inspection visits by (30%).





وزارة الصناعة
والثروة المعدنية
Ministry of Industry and Mineral Resources



International ISO certifications in the three critical areas of Quality, Environment, and Occupational Health and Safety have been awarded to 50 Saudi factories

This achievement reflects the commitment of national factories to applying best international practices and standards, including ISO 9001 for quality management systems, ISO 14001 for environmental management systems, and ISO 45001 for occupational health and safety management systems. It demonstrates the ability of Saudi industrial facilities to adopt advanced management systems and enhance the quality of their services and products, contributing to building a competitive and sustainable industrial economy.



Inaugurating the first-of-its-kind Air Cargo Security Control Center

In a strategic step aimed at enhancing the efficiency of air cargo procedures in line with the latest security concepts, the General Authority of Civil Aviation (GACA) inaugurated the integrated Transit Cargo Inspection Center at King Abdulaziz International Airport, as part of a series of similar centers located at King Fahd International Airport in Dammam and King Khalid International Airport in Riyadh. The center is considered the first of its kind globally and contributes to strengthening the security framework of air cargo supply chains through remote inspection and monitoring technologies, with direct connectivity to all authorized air cargo agencies in the Kingdom. The center also enables unified centralized monitoring that contributes to accelerating decision-making and enhancing the efficiency of security procedures through the deployment of advanced technologies for risk analysis and the tracking of cargo movements from receipt until arrival at air gateways.



Saudi Arabia wins membership of the Council of the International Maritime Organization (IMO) for 2026–2027 term

As part of strengthening the Kingdom's presence as an influential force in shaping the future of the global maritime industry, the Kingdom of Saudi Arabia won membership in the Council of the International Maritime Organization (IMO) for 2026-2027 term after receiving (142) votes from member states. This achievement reflects the Kingdom's advanced standing in maritime sector, as the Saudi maritime fleet ranks first regionally, while the Kingdom's ports continue enhancing their global competitiveness, leveraging the Kingdom's strategic location through (13%) of global trade passes via the Red Sea. This achievement also continues the Kingdom's ongoing influential role in developing international maritime regulations, supporting joint efforts to protect the marine environment, enhancing the safety and security of global maritime transport, and reflects the Kingdom's commitment to developing an advanced and sustainable maritime sector.

وزارة الصناعة
والتعدين
Ministry of Industry and Mineral Resources



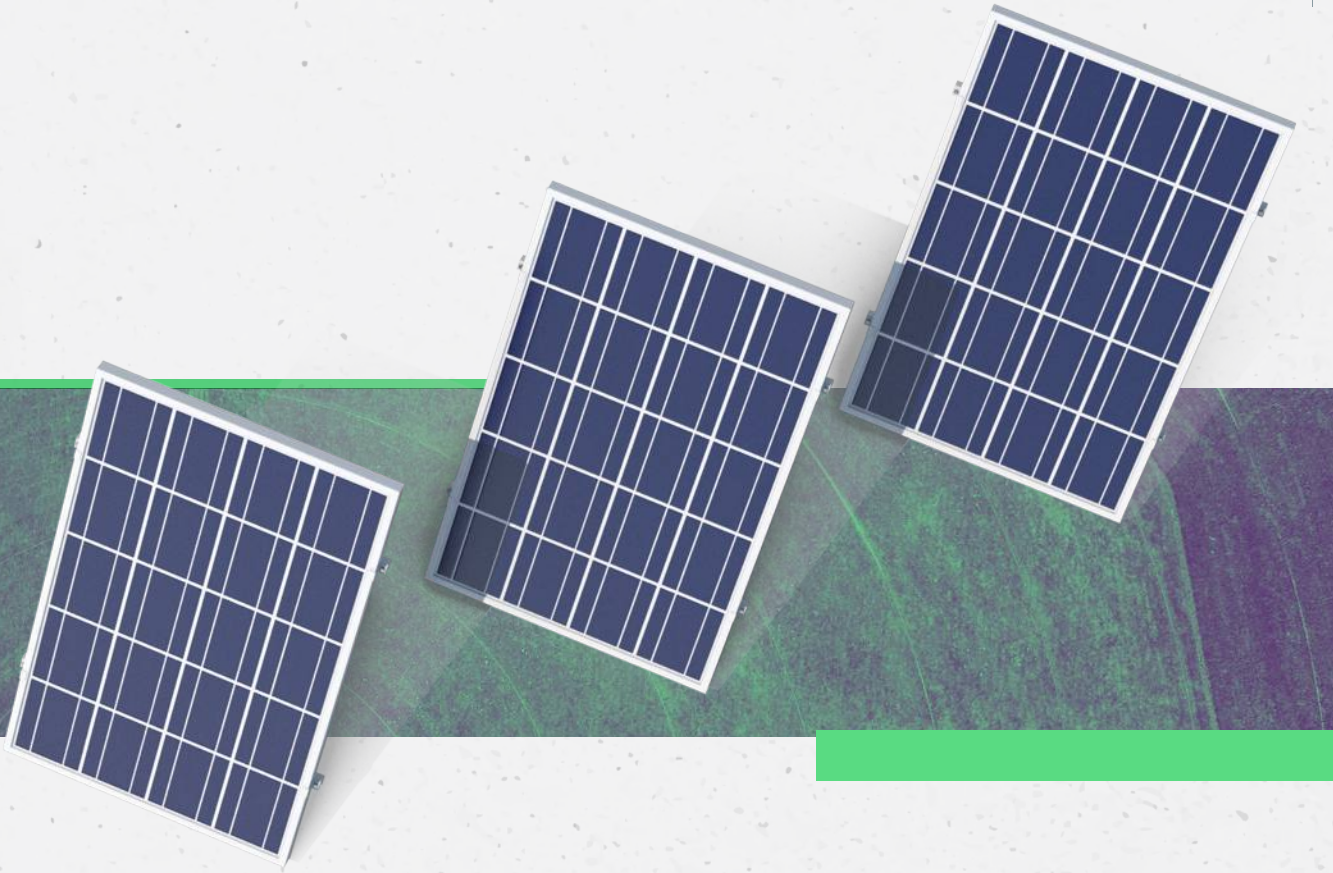
Launch of the Industrial Service Providers Council to enhance industrial integration in the Kingdom

The Industrial Council at the Ministry of Industry and Mineral Resources has launched the Industrial Service Providers Council with the aim of strengthening integration between national industrial establishments and industrial service providers in the Kingdom. This is to align with the objectives of the National Industrial Strategy and contributes to promoting sustainable industrial development, in collaboration with the National Industrial Development Center and the Royal Commission for Jubail and Yanbu.

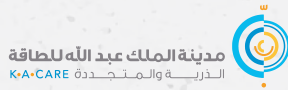




Sustainable



Resources



مدينة الملك عبد الله للطاقة
الذرية والمتجددة KACARE

الهيئة السعودية للمياه
Saudi Water Authority



Implementation of a Solar Thermal Water Desalination Project

King Abdullah City for Atomic & Renewable Energy (KACARE), in partnership with the Saudi Water Authority, completed the development of an innovative, low-pressure thermal technology for water treatment, reuse, and seawater desalination using Forward Osmosis (FO) technology. The project features a thermal coupling design linking a Concentrated Solar Power (CSP) system with the FO system to achieve effective and sustainable integration between both technologies. The project was awarded the Engineering, which honors innovation and sustainability.

وزارة الطاقة
MINISTRY OF ENERGY



Commercial Operation of Several Solar Energy Projects with a Total Capacity of Approximately 15.8 GW

Commercial operation commenced for solar energy projects under the National Renewable Energy Program in each of (Saad 2, Wadi Al-Dawasir, Al-Kahfah, Ar Rass 2, and Al-Khunayqiyah 1), with a total capacity of approximately (15.8 GW). This increased the total capacities covered by signed Power Purchase Agreements PPAs to more than (43 GW), with the total tendered capacities reaching approximately (63.8 GW).





Signing of Power Purchase Agreements (PPAs) for Multiple Projects with an Aggregate Capacity of 20.2 GW

The Ministry of Energy concluded PPAs for several projects, including the Phase VI projects (Samtah, Aldawadmi, Najran, Aldarb, and Baish) with a total capacity of (4.5 GW), and two wind energy projects (Sitara and Shaqra) under the 5th wave with a capacity of (3 GW); in addition to the 6th wave solar energy projects (Bisha, Khulais, Al-Hamij, Afif 1, and Afif 2) with a capacity of (12 GW), and the Yanbu wind energy project under Phase IV with a capacity of (0.7 GW), bringing the total capacities covered by the expected Power Purchase Agreements PPAs to more than (43 GW).





Issuance of Exploration Licenses for the Kingdom's First Mineralized Belts, Covering 4,788 km² across the Jabal Sayid and Al-Hajar Sites

Exploration licenses were awarded for the Kingdom's first mineralized belts at the Jabal Sayid site in Al-Madinah Region and the Al Hajar site in Aseer Region, covering a total area of 4,788 km². The licenses were granted through a highly transparent and competitive bidding process involving both local and international companies. The awards included two licenses in the Jabal Sayid belt, covering an area exceeding (2,000 km²), and two licenses at the Al-Hajar site within the Wadi Shwas belt, covering (1,896 km²). These sites are characterized by abundant deposits of copper, gold, silver, lead, and zinc, supporting the Kingdom's transition from the exploration phase to building integrated value chains, while efforts continue to launch new opportunities across areas exceeding (13,000 km²) of promising mineral zones.



Completion of phase I targets of the General Geological Survey Program, Covering 65% of the Arabian Shield Area

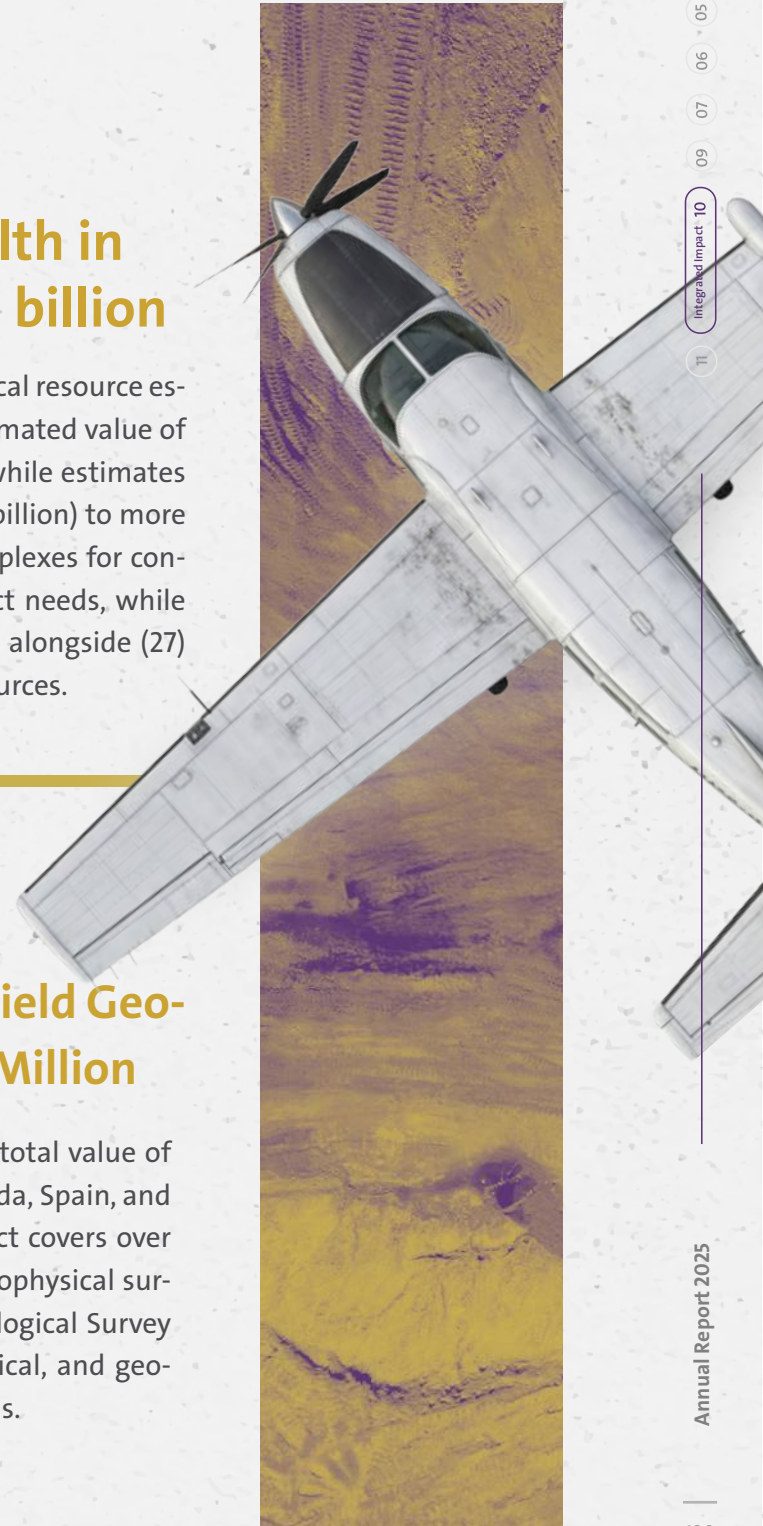
The Kingdom of Saudi Arabia continues its efforts to explore mineral wealth across the Arabian Shield, an area spanning (630,000 km²), within the framework of the General Geological Survey Program initiative, aiming to complete (65%) of the region's geological survey to provide accurate and reliable geological data for investors, thereby promoting mining investment and boosting the national economy

Geological Estimates of Mineral Wealth in Al-Baha and Najran Rise to USD 136.5 billion

The General Geological Survey Program revealed an increase in geological resource estimates for mineral wealth in the Al-Baha and Najran regions. The estimated value of mining resources in Al-Baha reached approximately USD (76 billion), while estimates of untapped mineral wealth in the Najran region rose from USD (38.7 billion) to more than USD (60.5 billion). Furthermore, Al-Baha houses (19 mining) complexes for construction materials that help fulfill the region's developmental project needs, while Najran features (4) mining reserve sites and mineralized sulfide belts, alongside (27) mining complexes supporting the strategic utilization of mineral resources.

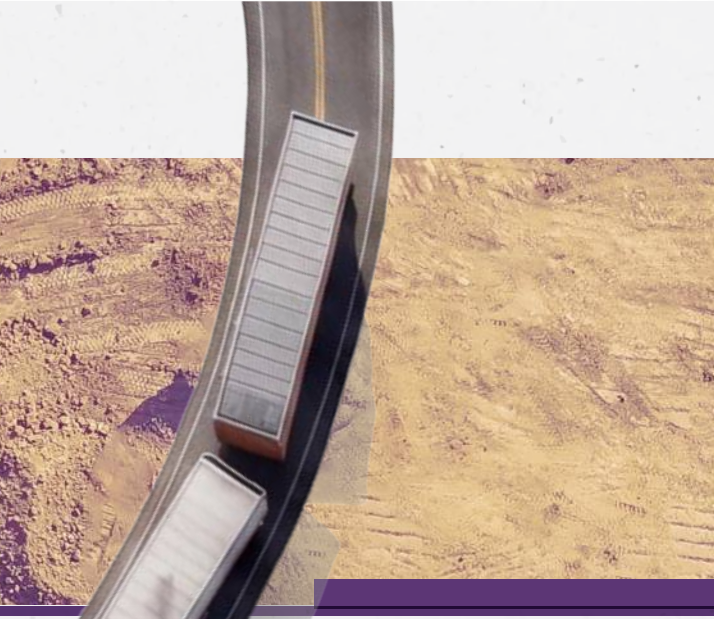
Launch of Phases II and III of the Arabian Shield Geophysical Survey Project Valued at USD 135.7 Million

Phases II and III of the geophysical survey project were awarded at a total value of USD (135.7 million) to an international consortium from Australia, Canada, Spain, and South Africa, led by Arabian Digital Mapping Company Ltd. The project covers over (1.7 million) line-kilometers within the Arabian Shield. The airborne geophysical survey of the Arabian Shield is a primary component of the General Geological Survey Program, which aims to provide high-resolution geological, geochemical, and geophysical data in accordance with the latest international specifications.



Market





Access

وزارة الصناعة
والتجارة المعدنية
Ministry of Industry and Mineral Resources



MSpharma

Launching MS PHARMA's First Fully Integrated Biologics Manufacturing Facility in the Kingdom

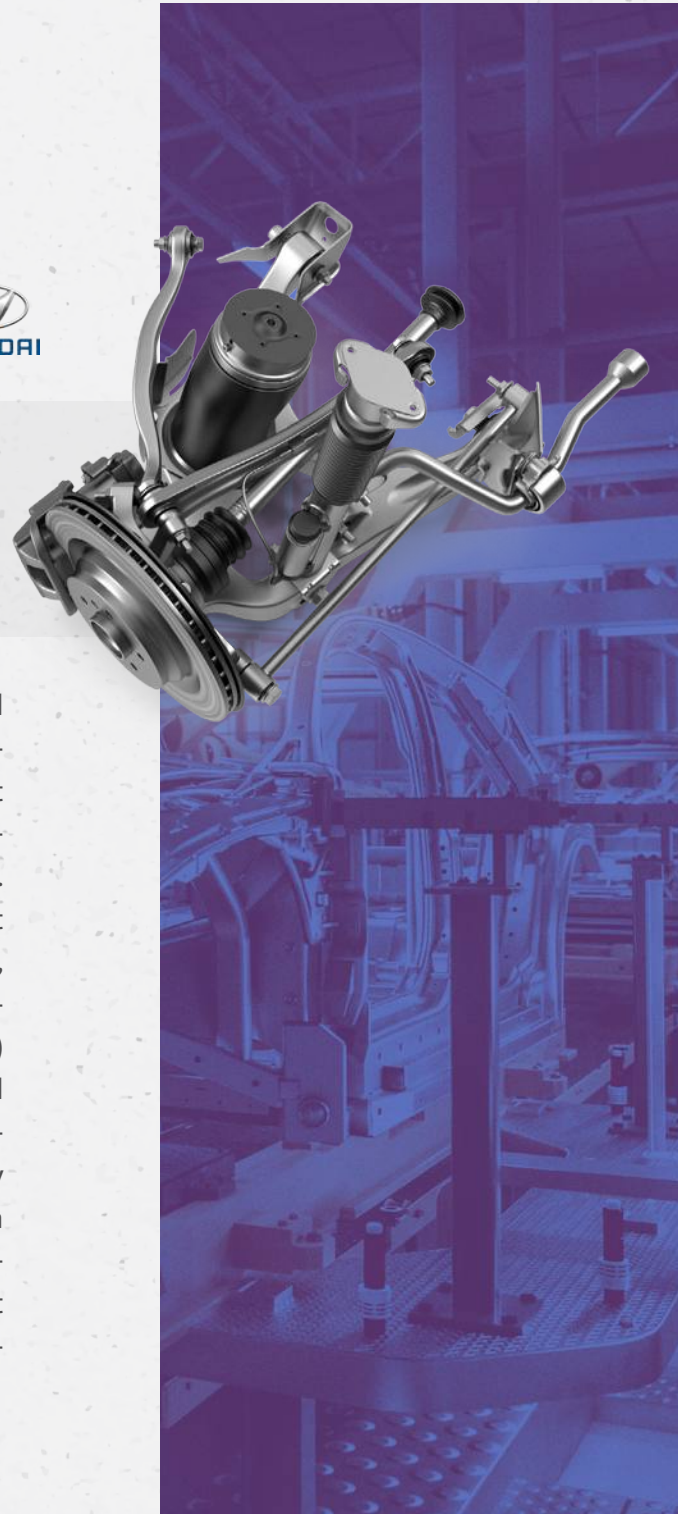
In alignment with the National Industrial Strategy's goals to localize pharmaceutical manufacturing in the Kingdom, the MS PHARMA biopharmaceutical plant was launched in the 3rd Industrial City in Riyadh, spanning an area of (3,000 m²), it stands as the first facility dedicated to the full formulation of biological drugs in the country, focusing on treatments for immunologic, ophthalmic, and osteoporotic diseases.





Establishing First Integrated Hyundai Motor Plant in the Kingdom to Enhance the Localization of Automotive Industry

In partnership with the Public Investment Fund (PIF), the Ministry of Industry and Mineral Resources established an integrated manufacturing plant for Hyundai Motor Co. within the King Salman Automotive Cluster in King Abdullah Economic City. The project represents a strategic milestone that contributes to localizing the automotive industry, transferring knowledge, and enhancing local content. It features a production capacity of (50,000) vehicles annually, including both conventional and electric vehicles, and is projected to inject approximately USD (5 billion) into the national economy by (2045). Additionally, the project will strengthen supply chains and generate high-skilled job opportunities, reinforcing the Kingdom's commitment to achieving Saudi Vision 2030 objectives and localizing advanced industries.



وزارة الصناعة
والثروة المعدنية
Ministry of Industry and Mineral Resources



FUTURE
MINERALS
FORUM

Future Minerals Forum signs strategic partnership with BMO Bank

The Future Minerals Forum announced the signing of a strategic partnership with BMO Bank, a leading global investment bank in the mining sector. This step aims to enhance investment flows into the mining and minerals sector and improve financing opportunities by providing a unified platform that connects mining companies with regional and international investors, thereby driving the sector's growth and sustainability.

SAUDI EXIM بنك التصدير والاستيراد السعودي

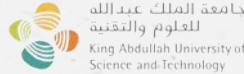
Credit Facilities of the Saudi Export-Import (EXIM) Bank Reach USD 30.9 Billion, Driving Non-Oil Exports

Total credit facilities extended by the Saudi EXIM Bank have reached USD (30.9 billion) since its inception in 2020. These facilities are part of the bank's vision to strengthen the non-oil national economy and achieve Saudi Vision 2030 objectives. They aim to increase the Kingdom's non-oil exports and enhance competitiveness in regional and global markets, and unlock commercial and investment opportunities for local exporters while maintaining a commitment to ESG standards to support national economic growth and diversify income sources.



Over USD 800 Million invested across 4 new partnerships to scale industrial operations

Four new partnerships were signed across various industrial cities within the Kingdom, with an investment volume exceeding USD (800 Million) and covering an area of more than (2.7 million m²). The partnerships aim to drive industrial expansion and empower the logistics ecosystem. They include the development of modern industrial complexes in south Riyadh, specialized warehouses to support supply chains in Jeddah, and advanced industrial development studies and projects that meet private sector aspirations. These initiatives enhance MODON's capabilities as a key enabler of national industry, supporting economic growth and fulfilling Saudi Vision 2030 objectives.



Development of the Fastest Quantum Random Number Generator Enhances Digital Security and Supports Vital Industrial Applications

In a collaborative effort between King Abdulaziz City for Science and Technology (KACST) and King Abdullah University of Science and Technology (KAUST), the fastest Quantum Random Number Generator (QRNG) has been developed in accordance with international standards. The device successfully passed the randomness tests established by the National Institute of Standards and Technology (NIST), a premier international benchmark. The new generator features a generation rate approximately one thousand times faster than other quantum generators. This high generation rate was achieved through innovations in device manufacturing and post-processing algorithms. The design also integrates ultra-small micro-LEDs, which reduce power consumption and allow the device to be portable for various applications.

هيئة المحتوى
والمشتريات الحكومية
Local Content & Government
Procurement Authority



Increasing the Mandatory List of National Products with 449 new national products

The Local Content and Government Procurement Authority continued updating the Mandatory List of National Products throughout 2025 by adding (449) new national products across several sectors, including construction, pharmaceuticals and medical preparations, medical supplies, food and agricultural products, furniture, chemicals and fertilizers, information technology, cybersecurity, transportation and logistics, consumer products, and other vital sectors. These updates increased the total number of products on the Mandatory List to (1670) national products. During 2025, 212 national factories benefited from the list, while the total number of tenders covered by the Mandatory List reached (38,175) with a value exceeding USD (13.5 billion). These efforts contribute to enhancing the competitiveness of national industries and increasing the contribution of local content in government procurement.

هيئة المحتوى المحلي
والمشتريات الحكومية
Local Content & Government
Procurement Authority



Increase Local Content Share in Government Procurement to 51.2%

The share of local content in government procurement increased to (51.2 %) by the third quarter of 2025, compared to (33.7%) in 2020, reflecting continued efforts to strengthen local content and develop national capabilities. This progress contributes to diversifying the national economy, reducing reliance on imported products, and supporting the development of a strong and sustainable economy built on national talent and capabilities.

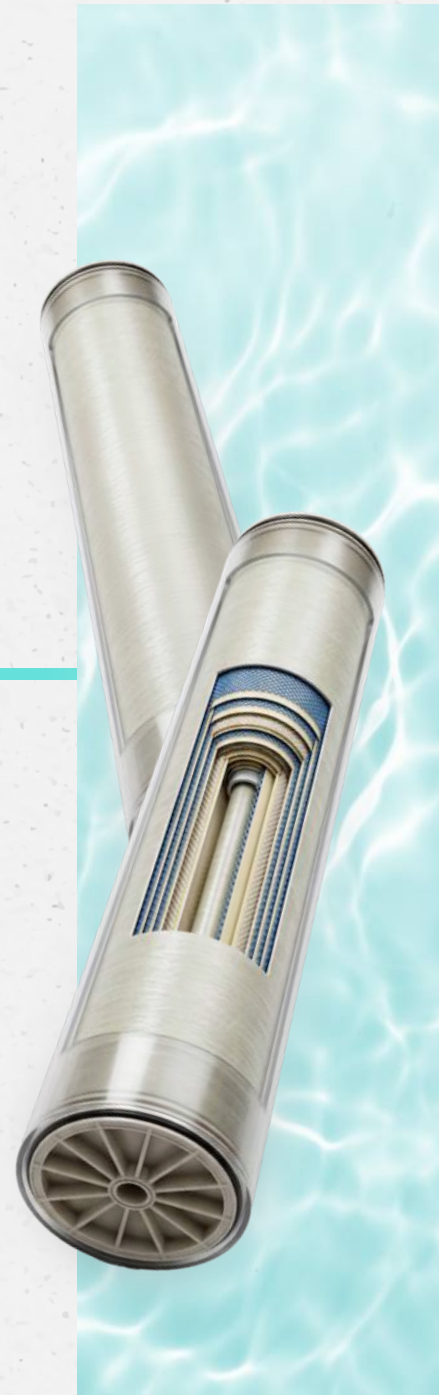
هيئة المحتوى المحلي
والمشتريات الحكومية
Local Content & Government
Procurement Authority



TORAY

Launch of the Largest Reverse Osmosis Membrane Manufacturing Plant in the Middle East with an Annual Capacity of 300,000 Membranes

The manufacturing facility of Toray Membrane Middle East Co.Ltd. for reverse osmosis (RO) membranes was inaugurated in the Third Industrial City in Dammam. It is the largest facility of its kind in the Middle East, with an annual production capacity of (300,000) membranes. The plant encompasses all stages of the manufacturing process, contributing to the localization of RO membrane production, strengthening local supply chains, facilitating the transfer of advanced knowledge and technologies, supporting national talent development, and advancing the Kingdom's economic and industrial development objectives.





Laying the foundation stone for the new Capital letter Jeddah Islamic Port to the logistics zone in Al Khumrah

As part of Saudi Arabia's efforts to enhance logistics efficiency and improving transport infrastructure, a new 17 km logistics corridor has been launched which directly links Jeddah Islamic Port to Al-Khumra logistics zone in southern Jeddah. The project is expected to serve more than (8,000) trucks daily through a direct connection to Jeddah Islamic Port, the Kingdom's largest seaport, which handles approximately (75%) of the Kingdom's total imports and exports. The project is critical and is set to enhance the smooth flow of trade and strengthen supply chain efficiency.



Launching the expansion of the South Container Terminal at Jeddah Port with USD 800 Million investments

To enhance operational capabilities and increase the capacity of Jeddah Islamic Port, expansion for the South Container Terminal was launched at an investment value of USD (800 Million) in a partnership between MAWANI and the global operator DP World, the project utilizes advanced automation to elevate operational efficiency. The development incorporates the latest automation and digitization technologies to improve operational efficiency, reducing gate transaction times from two minutes to just 10 seconds, alongside deploying AI technologies for higher-precision cargo analysis and streamlined operations.





A Pioneering Pilot Project for Parcel Delivery by Drones

In a pilot project paving the way for future expansion within the Kingdom's logistics sector, a specialized parcel delivery operation was launched using drones to develop the postal sector and elevate its operational efficiency. This initiative represents a major step towards employing advanced technologies in delivery services, helping accelerate operations, expand service coverage, and enhance the sector's readiness to keep pace with rapid advancements in logistical solutions.





Laying the Foundation Stone for an Integrated Logistics Zone and Inaugurating the Second Container Terminal Expansion at King Abdulaziz Port in Dammam

The foundation stone was laid for an integrated logistics zone at King Abdulaziz Port in Dammam, alongside the inauguration of the new expansion of the second container terminal, with private sector investments exceeding USD (746.7 Million). These projects enhance operational efficiency, increase the port's capacity, and strengthen supply chains. They also reinforce the port's position as a global trade and logistics hub serving national industries and trade movement, supporting the objectives of Saudi Vision 2030 by developing infrastructure, increasing competitiveness, and attracting solid investments.



Signing Contract for a Logistics Zone at King Abdulaziz Port with USD 80 Million Investment

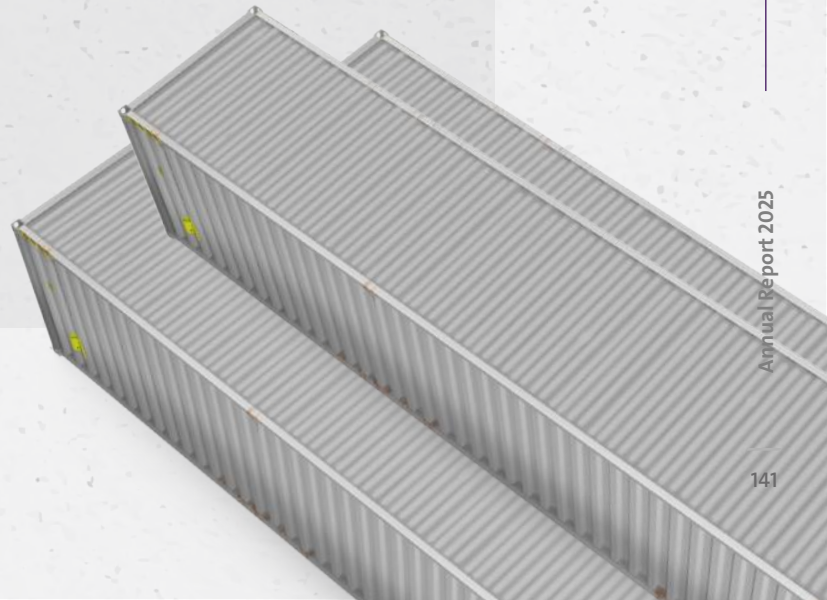
MAWANI signed a contract with Alissa International Motors Company to establish a logistics zone at King Abdulaziz Port in Dammam, with an investment value of USD (80 Million) over an area of (382,000 m²), which is dedicated to the import and re-export of vehicles and spare parts. This step is part of the Authority's initiatives supporting the strategic objectives of the National Transport and Logistics Strategy, which aims to establish integrated logistics zones and deliver high-efficiency services that drive economic development and achieve Saudi Vision 2030 objectives.





Mawani Adds Five New Shipping Services by Hapag-Lloyd and Maersk to Three Saudi Ports

The Saudi Ports Authority (MAWANI) announced the addition of five new shipping services operated by Maersk and Hapag-Lloyd to Jeddah Islamic Port, King Abdulaziz Port in Dammam, and Jubail Commercial Port. This step consolidates the pivotal role of Saudi ports and elevates their regional and international competitiveness and it also aligns with MAWANI's continuous efforts to improve the Kingdom's standing on the Liner Shipping Connectivity Index (LSCI) and foster effective connections with global markets, in accordance with the National Transport and Logistics Strategy aimed at establishing the Kingdom as a global logistics center connecting three continents.





Improving Human Capital



and Entrepreneurs

hip



Capability Development

Where accomplishments begin

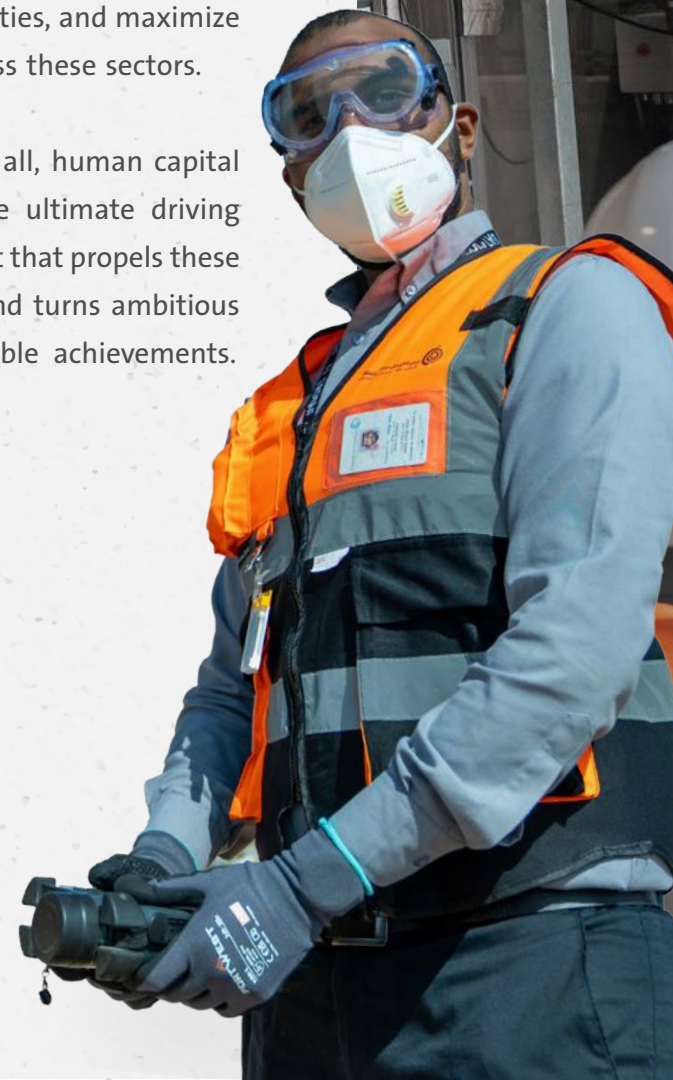
Saudi Vision 2030 has mapped out a clear path toward establishing the Kingdom as a leading industrial powerhouse and a global logistics hub. It achieves this by maximizing the economic impact of vital sectors, expanding their scope, and fostering their growth and sustainability, ultimately cultivating a more mature and expansive investment ecosystem.

This transformation is ultimately driven by the people behind it — those who manage, operate, develop, and innovate. Accordingly, national talent pipelines are created to cater for the needs of these sectors.

Curricula are built around market realities, training is delivered in an applied format, and partnerships extend to universities, educational institutions, and international organizations to bring learning closer to practice.

Supported by the National Industrial Development and Logistics Program, this pathway is expanding to empower national talents, broaden specialized job opportunities, and maximize local content across these sectors.

At the heart of it all, human capital stands out as the ultimate driving force—the catalyst that propels these sectors forward and turns ambitious targets into tangible achievements.



Capability Development in Energy Ecosystem

Key Ecosystem Figures for 2025

As the Kingdom's energy sector undergoes a major transformation, an integrated ecosystem is emerging to prepare national talents capable of supporting the expansion of renewable energy and nuclear technologies. This approach focuses on specialized academic and training programs, preparing national leaders who possess the technical expertise needed to successfully manage the demands of the changing energy market.

Through the Executive Master's programs in Renewable Energy, the role of national talents is being strengthened in advanced positions across the sector. This pathway is further reinforced through diploma programs and employment-linked tracks, within a market-driven framework supported by cooperation agreements with national companies that contribute to enabling graduates and integrating them into the workplace.

In the field of nuclear energy, capacity building continues through the development of nuclear engineering programs at Saudi universities, benefiting from international training programs, and developing academic content in line with global standards, thereby enhancing the readiness of national talent to work in advanced technical fields.

54



Students enrolled in the Executive Master's Program in Renewable Energy.

50



Graduates from the inaugural cohort of the diploma program.

13



Graduates from the Nuclear Engineering Micro-specialization Program.

73



Trainees enrolled in technical and vocational training programs in renewable energy, including 21 graduates holding bachelor's degrees.

20



Students enrolled in the Professional Master's Program in Nuclear Engineering.

33



Students enrolled in international training programs.

5



Awareness events and exhibitions.

970



Beneficiaries from the awareness events and exhibitions held for university students.



Academy of Defense Industries (ADI)

In a sector built on precision, specialization, and technical readiness, the Academy of Defense Industries (ADI) is emerging as one of the strategic pathways for building the human capabilities that underpin this vital field.

ADI was established in 2022 as part of the human capability development strategy initiatives for the military industries sector, in cooperation with the private sector, to serve as a specialized platform for developing national talents and qualifying them to work in an advanced industrial environment.

Key ADI Figures for 2025

190 

Trainees in training programs.

96 

Trainees in the first cohort.

94 

Trainees in the second cohort.

5 

Memoranda of understanding with local and international entities in technological training and qualification.

ADI focuses on designing and delivering specialized training programs that cover precise technical fields, including electrical, mechanical, electronic, and chemical technologies, in addition to manufacturing, maintenance, production quality, and artificial intelligence applications in defense systems.

ADI also reinforces this direction through partnerships with international entities specialized in training and technical certifications, supporting knowledge transfer and expanding the scope of qualification in line with global standards.

ADI's impact extends to supporting the localization of military industries, strengthening local content, and developing skilled national talents capable of contributing to an advanced defense industrial ecosystem. These efforts support economic diversification and enhance the economy's strategic capabilities.





Saudi Logistics Academy (SLA)

As part of Saudi Vision 2030's ambition to position the Kingdom as a global logistics hub, an integrated ecosystem is being developed to prepare the talents needed to lead this transformation and amplify its economic impact.

Within this broader ecosystem, the Saudi Logistic Academy (SLA) serves as a specialized pathway for human capability development in the transport and logistics sector, supported by the National Industrial Development and Logistics Program.

Key SLA Figures for 2025

+6,000 

Trainees in short courses.

+1,300 

Graduates from the diploma programs.

+150 

Leaders in executive programs.

150 

Collaboration agreements with public and private sectors.

SLA bridges the gap between training and real-world operations through applied pathways that cover various logistics disciplines, starting from basic skills and extending to leadership preparation, within a training environment that simulates supply chains and logistics.

This approach strengthens the readiness of national talents to enter the labor market with a high level of competence. It also contributes to the localization of specialized jobs and improves performance within the sector, supporting the sustainability of its growth and enhancing its investment attractiveness.

As the network of partnerships with the public and private sectors expands, integration between training and market needs is strengthened, enabling SLA's outputs to become an active part of a logistics ecosystem that is developing at an accelerated pace.



National Automotive & Vehicles Academy (NAVA)

As the sector moves toward sustainable mobility and advanced technologies, the National Automotive & Vehicles Academy (NAVA) is emerging as a specialized pathway for building the human capabilities needed in a rapidly advancing technological and industrial sector.

NAVA is located in the Industrial Valley at King Abdullah Economic City, placing it at the heart of industrial and commercial activities, giving it direct access to the production and development environment, and allowing for alignment of its outputs with the needs of the sector.

NAVA works to develop educational and applied programs linked to the future of the automotive industry, covering maintenance, technology, and operations, while integrating concepts of artificial intelligence and autonomous driving into its training pathways.

During 2025, NAVA strengthened its presence through a network of strategic partnerships with leading global companies, including Lucid, Hyundai, and ceer. These partnerships contributed to providing hundreds of specialized training opportunities and qualifying national talents in disciplines related to the electric vehicle industry.

NAVA also launched the first specialized Arabic glossary for the classification and maintenance of electric vehicles, this milestone supports the development of Arabic technical content and helps bridge the knowledge gap in this field.

This pathway extends with a forward-looking vision that aims to train more than (10,000) trainees by 2030, as part of supporting the growth of the vehicle sector and strengthening the transition toward smart and sustainable transportation.



Key NAVA Figures and Achievements for 2025

Providing


+ 200 

Training opportunities through a partnership with Hyundai.



Participation in international exhibitions and events specialized in the electric vehicle sector.

Qualifying

300 

Trainees in specialized programs with ceer company.



Launch of the first specialized Arabic glossary on electric vehicle maintenance and classification.

Creating

+ 500 

Training opportunities through several partnerships with industrial entities.



Strategic partnerships with global companies including Lucid, Hyundai, and ceer.

Where Creativity Meets Innovation, National Capabilities Thrive

On the International Day of Creativity and Innovation,
the Fourth Industrial Revolution Capability Center stands out as a key enabler of advanced
technology adoption, fostering creativity and innovation to develop national talent.

Key Figures of the Center (as of end of 2025):



Value and Impact:

\$1.5 million
Estimated economic value of services

123 units manufactured
as part of product development

Key Achievements:



THE SHOP FLOOR

An integrated incubator that brings together entrepreneurs, innovation, industry, and logistics

The Shop Floor initiative is a specialized Entrepreneurship Development Hub that integrates the Industrial and Logistics Sectors

The Shop Floor Services

- ▶ Prototyping laboratories
- ▶ Product design and development
- ▶ Training and mentorship
- ▶ Facilitation of procedures and licensing
- ▶ Co-working spaces
- ▶ Investor pitching opportunities



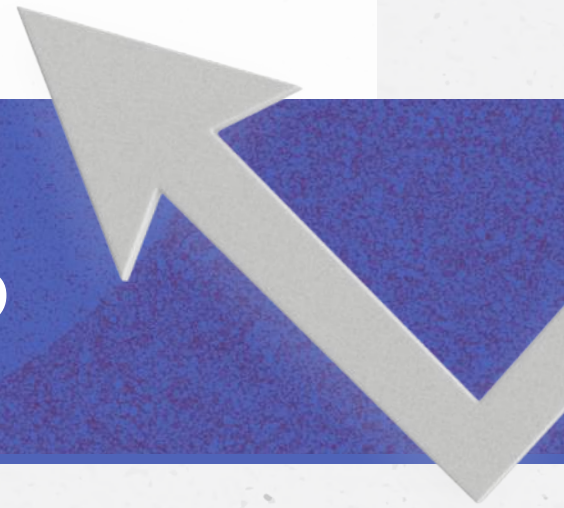
Impact of the Initiative

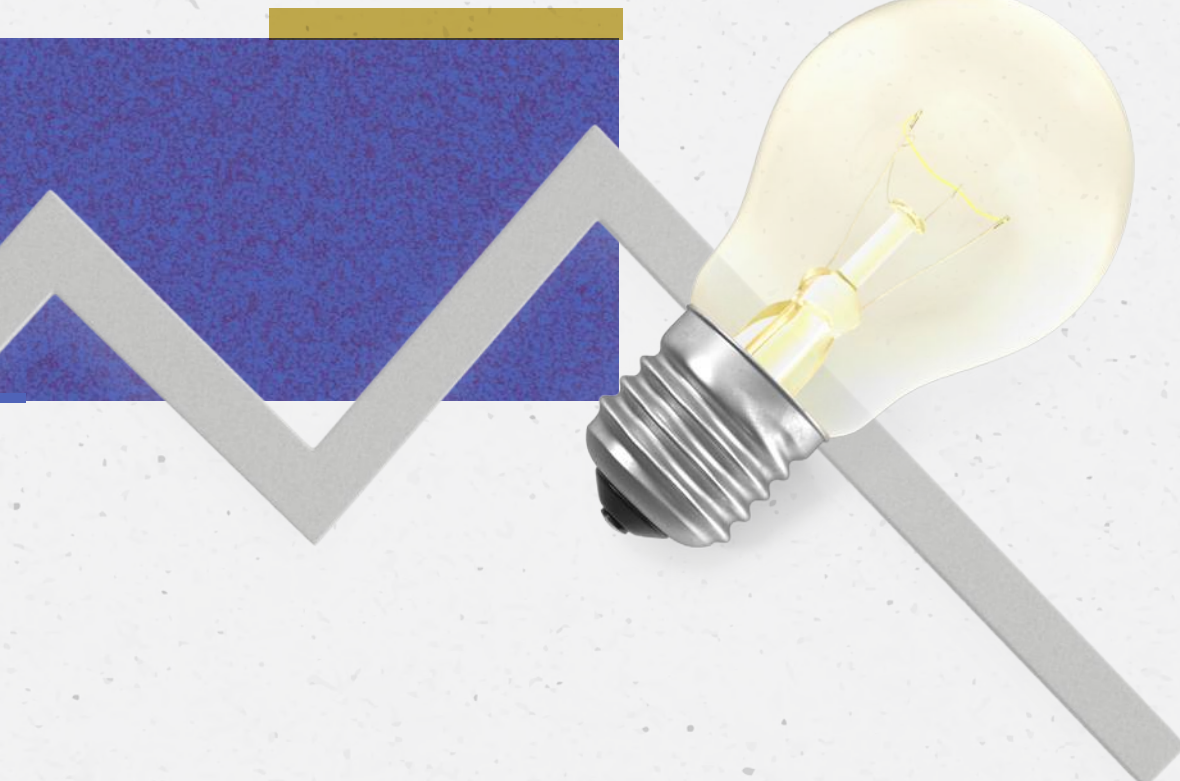
- ▶ Accelerating Industrial Product Development
- ▶ Strengthening Local Industrial Content
- ▶ Empowering Industrial Startups
- ▶ Attracting Investment and Developing



Flagship

Programs





برنامج ألف ميل
لريادة الأعمال
ENTREPRENEURSHIP
MILE

1K MILE Program for Entrepreneurship

The 1K MILE Program initiative comes as part of the efforts of the National Industrial Development and Logistics Program to achieve the objectives of Saudi Vision 2030 in supporting entrepreneurship, enabling promising projects in targeted sectors, and creating high-value opportunities within a renewed economic environment. This is achieved through investment in modern technologies, strengthening the investment environment, and leveraging the Kingdom's strategic location to reach local and international markets.



Key Figures

+850

Qualified Entrepreneurs

+260

Incubated Entrepreneurs

53.3
USD Million

Value of achieved investments

+40

Supporting Entities

+50

Site Visits

+280

Training Hours



Driving Impact Through Incentives

05

06

07

09

Integrated Impact 10

11

Training and Qualification



Intensive and diverse programs across multiple fields that support the entrepreneur's journey.

Financial Incentives



Financial incentives for the best projects, along with support in fulfilling the requirements of financing entities.

An Industrial Land or Ready Factory



Support in obtaining industrial land or ready-built factories for qualified projects, in cooperation with supporting entities.

Site Visits



Visits conducted to provide entrepreneurs with direct insights and essential information that contribute to achieving the project goals.

Feasibility Studies



Delivering the required expertise and technical capabilities to prepare feasibility studies in compliance with the requirements of the concerned entities.

Investor Pitching



Securing partnership opportunities by presenting selected projects to investors and benefiting from their expertise.



Building on the initiative's milestones, "1K Mile Program" has achieved

Exceptional Growth in its Fourth Edition



Number of Applicants

1st Cohort 1500

2nd Cohort 3943

3rd Cohort 8001

4th Cohort

12,340



DALEEL Platform

The “DALEEL” platform, launched under the National Industrial Development and Logistics Program (NIDLP), serves as a comprehensive digital gateway offering integrated content on the program, its sectors, and supporting entities, in addition to showcasing national achievements. The platform plays a key role in improving transparency, strengthening trust among beneficiaries, and enabling investors through the provision of reliable and regularly updated information that supports informed decision-making and enhances awareness of growth opportunities within the program’s sectors.

DALEEL Platform



A training platform providing educational programs focused on national strategies and the investor journey, aimed at improving operational efficiency and enhancing the investor experience.



A communication platform designed to improve the investor experience through access to enabling services, advisory support, and investment opportunities, while strengthening integration and ensuring prompt response to investors' requirements.





The Power of Integration

Where sectors unite and impact is created
at NIDLP's Annual Ceremony 2025



As part of a year marked by significant achievements in advancing the objectives of Saudi Vision 2030, NIDLP hosted its 2025 Annual Ceremony to honor high-performing entities and outstanding accomplishments within the program ecosystem, while recognizing winners of the NIDLP Excellence Award, which showcases leadership, integration, and impactful achievements.

The event represents an annual occasion to celebrate progress across the program’s four key sectors — energy, mining, industry, and logistics — as well as its two strategic focus areas: the Fourth Industrial Revolution and local content. It also promotes a culture of innovation and excellence and encourages ecosystem partners to continue driving the national transformation agenda toward a sustainable and diversified economy.

Through this ceremony, NIDLP reaffirms its commitment to collaboration with partner entities, driving sustainable impact and strengthening Saudi Arabia’s global leadership in industry and logistics.



أبرز ما تم تحقيقه
في الربع الثالث لعام 2025
جائزة
ندليب
للتميز
NIDLP Excellence Award

NIDLP Excellence Award 2025

An annual recognition initiative launched by NIDLP to honor distinguished executing entities that have demonstrated outstanding and impactful performance in supporting and advancing the objectives of the four sectors and the two focus areas.

The Award seeks to strengthen a culture of institutional excellence and motivate organizations to embrace leading practices in innovation, integration, and implementation, ultimately supporting national economic growth and the goals of Saudi Vision 2030. It stands as a symbol of national collaboration and reflects the strong partnership between the public and private sectors.





Distinguished Recipients of the NIDLP Excellence Award



مستفيد من أرض صناعية





NIDLP CEO's Message

Eng.

Jameel bin Ahmed Al-Ghamdi

CEO

National Industrial Development and
Logistics Program (NIDLP)

In 2025, NIDLP entered a more advanced phase in its development journey, as efforts have evolved from merely achieving targets to maximizing impact and reshaping sectoral efficiency at both operational and execution levels. This transformation aims to achieve integration across vital sectors and strengthen value chain connectivity, while steadily advancing empowerment and raising the level of ambition under the leadership of the Custodian of the Two Holy Mosques King Salman bin Abdulaziz Al Saud, and crown prince and prime minister His Royal Highness Prince Mohammed bin Salman bin Abdulaziz, — may Allah protect them.

During the year, the program achieved substantial progress in a number of operational indicators. In the **energy sector**, the Kingdom strengthened its global position by achieving record figures in the cost of electricity generation from renewable energy. The Al-Shuaiba Photovoltaic Solar Power Plant Project achieved the lowest cost for purchasing electricity generated from solar energy in the world at a price of (1.04 cents/kWh), in addition to the Najran Solar Energy Project achieving the second-lowest cost for purchasing electricity generated from solar energy in the world at a price of (1.09 cents/kWh). The Al-Dawadmi Wind Energy Project also achieved a record figure regarding the cost of purchasing electricity generated from wind energy at (1.33 cents/kWh), in addition to the Al-Ghat Wind Energy Project achieving the second-lowest cost for purchasing electricity generated from wind energy in the world at a price of (1.57 cents/kWh). The total capacities covered by the expected Power Purchase Agreements exceeded (43 GW), and the contribution of renewable energy to the energy mix increased to 15.64%. The High-Efficiency Air Conditioner Replacement initiative also achieved (100%) of its targets.

The industrial sector continued to achieve significant milestones, as the number of industrial establishments reached (12,946) alongside the operation of (1,511) ready-built factories, reflecting the expansion of the production base and the acceleration of industrial infrastructure readiness. Key strategic projects also included the launch of the aviation industries cluster in Jeddah, the multi-storey factories project in Dammam, and the inauguration of the MS Pharma plant as the Kingdom's first fully integrated biopharmaceutical manufacturing facility.

As part of efforts to localize strategic industries, (347) companies were licensed in the military industries sector, highlighting ongoing progress toward strengthening national capabilities and enhancing associated supply chains.

The mining sector also recorded strong momentum, with active mining licenses reaching (2,925) and the estimated value of mineral resources surpassing USD (2.5 trillion). Supporting this growth, the Kingdom launched the Mining Innovation Studio and the Global Mining Innovation Competition to encourage the adoption of cutting-edge technologies across the sector.

Meanwhile, the logistics services sector achieved a significant reduction in customs clearance time to only two hours, compared to (288) hours previously. Infrastructure expansion also continued through the development of (24) logistics platforms and the establishment of five special economic zones, supporting the integration of the transport ecosystem and reinforcing the Kingdom's position as a global logistics hub.

The program maintained its support for financial enablement initiatives, with total credit facilities provided by the EXIM Bank reached USD (30.9 billion) (cumulative). This contributes to strengthening the presence of national products in global markets and enhancing the competitiveness of exporters.

Non-government investments reached more than USD (206.7 million) during the year, exceeding the annual target and reflecting strong private sector confidence in the program's investment environment.

As part of the Fourth Industrial Revolution focus area, the Advanced Manufacturing and Production Center was inaugurated. Additionally, the world's fastest Quantum Random Number Generator (QRNG) has been developed confirming NIDLP's direction towards the adoption of advanced technologies and elevating the competitiveness of the industrial sector.

The Local Content recorded a notable increase in the share of local content in government procurement, reaching (51.2%), compared to (33.7%) in (2020). In addition, (449) new national products were added to the Mandatory List, bringing the total number of products to more than (1,670). The total number of tenders covered under the Mandatory List reached (38,175), with a total value exceeding (USD 13.51 billion). Furthermore, the largest reverse osmosis membrane manufacturing plant in the Middle East was inaugurated, with an annual production capacity of (300,000) membranes.

This progress embodies the program's transition to a more advanced and mature phase centered on amplifying sustainable economic impact through greater integration among stakeholders and higher execution efficiency.

In conclusion, I would like to convey my heartfelt appreciation and utmost gratitude to Their Excellencies, the members of the Program Committee, and the leaders of the executing entities for steering the transformation journey with exceptional strategic foresight. My sincere thanks is also extended to the distinguished program team whose tireless efforts and commitment have played a pivotal role in delivering these achievements and advancing the program's targets.

We reaffirm our continued commitment to maximizing impact, strengthening integration, and enhancing execution efficiency in a manner that supports the competitiveness of the national economy and advances the **goals of Saudi Vision 2030**.

May Allah grant us success.

الهدف السنوي 2025



برنامج تطوير الصناعة
الوطنية والخدمات
اللوجستية



رؤية
VISION 2030
المملكة العربية السعودية
KINGDOM OF SAUDI ARABIA





Corporate communication sector

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Disclaimer:

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نتكامل لصناعة المستقبل
Integrating Towards a Prosperous Future



Sector
Energy



Sector
Mining



Sector
Industry



Sector
Logistic Services



Focus Areas
Fourth Industrial Revo-
lution (4IR)



Focus Areas
Local Content



LinkedIn



YouTube



X



دليل
DALEEL



1K
MILE
PROGRAM



2025