

Saudi Arabia Aviation Trends & Outlook

October 20, 2015



المطارات الداخلية
DOMESTIC AIRPORTS

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GACA Profile

- The General Authority of Civil Aviation (GACA) was established in the Kingdom of Saudi Arabia in 1354 AH (1934 AD) when an oil company, which later became part of Aramco, constructed a desert airstrip near the city of Jubail.
- Over those years, the Kingdom achieved record growth and made quantum leaps in the field of civil aviation, witnessing tremendous development and growth in:
 - passenger air transport,
 - air cargo,
 - airport construction & airport infrastructure,
 - air navigation and air traffic control.



GACA Vision, Mission



GACA Vision:

- To create a safe and secure aviation environment in accordance with the most rigorous international safety standards, and build a modern airports system that offers consistently exceptional, state-of-the-art service.

GACA Mission:

- To develop the air transport industry in accordance with the latest international standards, strengthen the position of the Kingdom as a globally influential player in civil aviation, achieve financial growth and sustainability, and enforce the relevant rules, regulations and procedures to ensure air transport safety and security.

Domestic Airports

- A chain of 23 regional and domestic airports connecting the kingdom of Saudi Arabia.



المطارات الداخلية
DOMESTIC AIRPORTS

Domestic Airports vision, and mission



Domestic Airports Vision:

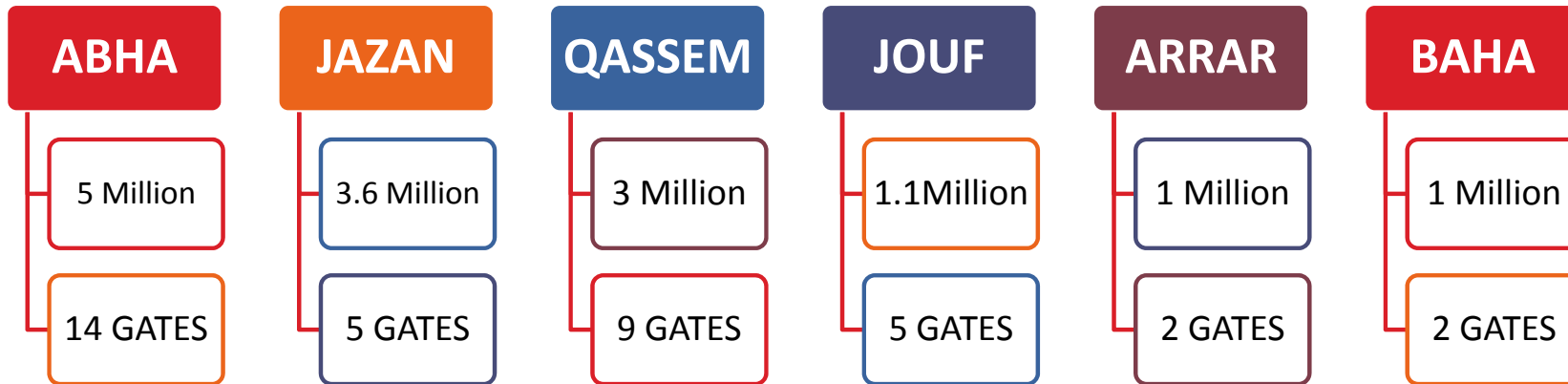
- Ideal Commercial Airports Network

Domestic Airports Mission:

- To Build, develop and maintain airports with optimized resources and managed them with qualified manpower to ensure the safety, security, and satisfaction of their users while maximizing revenue.



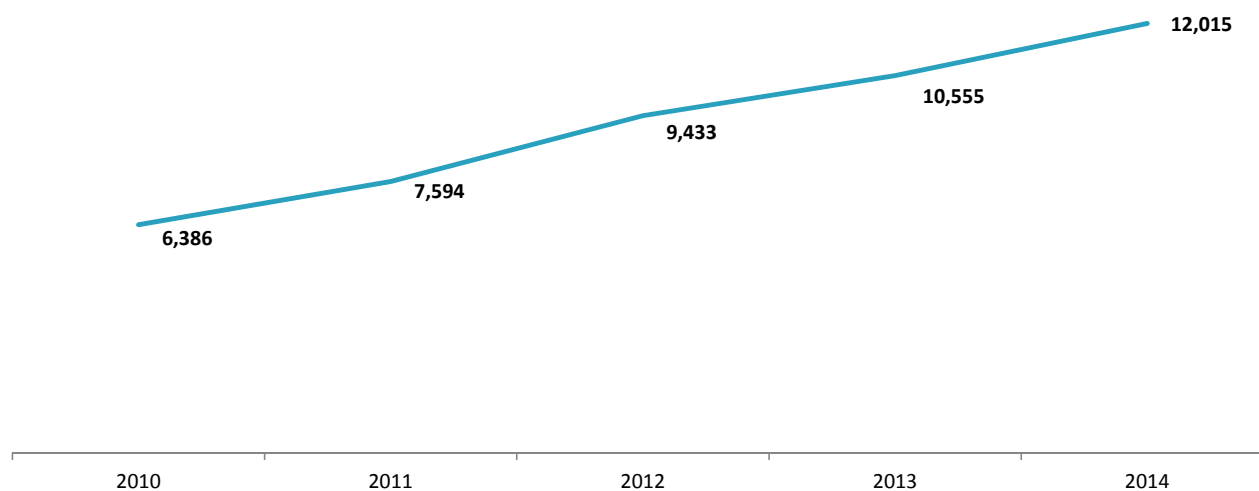
Newly Constructed Domestic Airports



GACA assure to build its new airports with best world class technology and clean energy to become an economical engines that enhance competitiveness and business development

Domestic Airports Passenger Volume

Domestic Airports Passenger Volume (5 Years)



Compounded growth rate %13.47

2014 – KSA Aviation Summary

27
Airports

74 million
Passengers

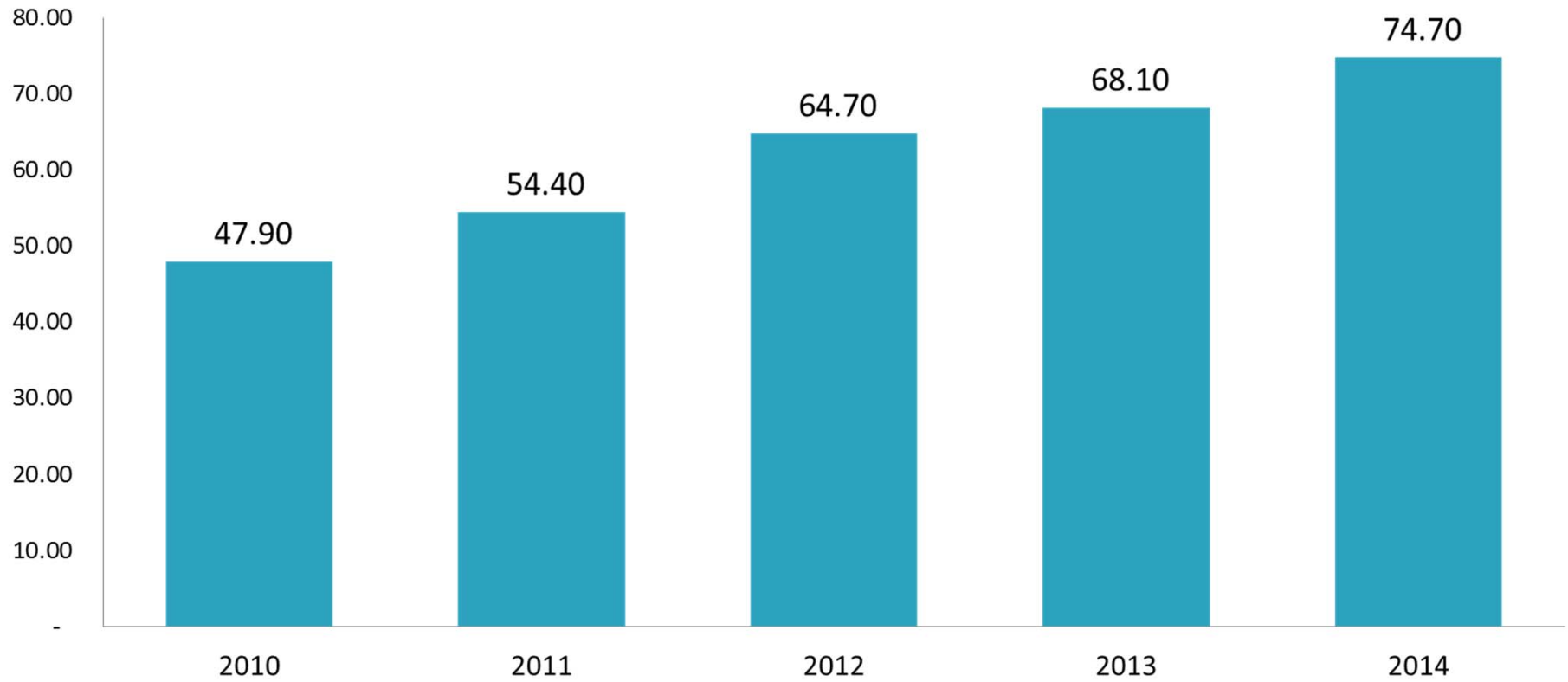
589,216
Flights

120
Visiting
Airlines

9.7%
PAX Growth
in 2014

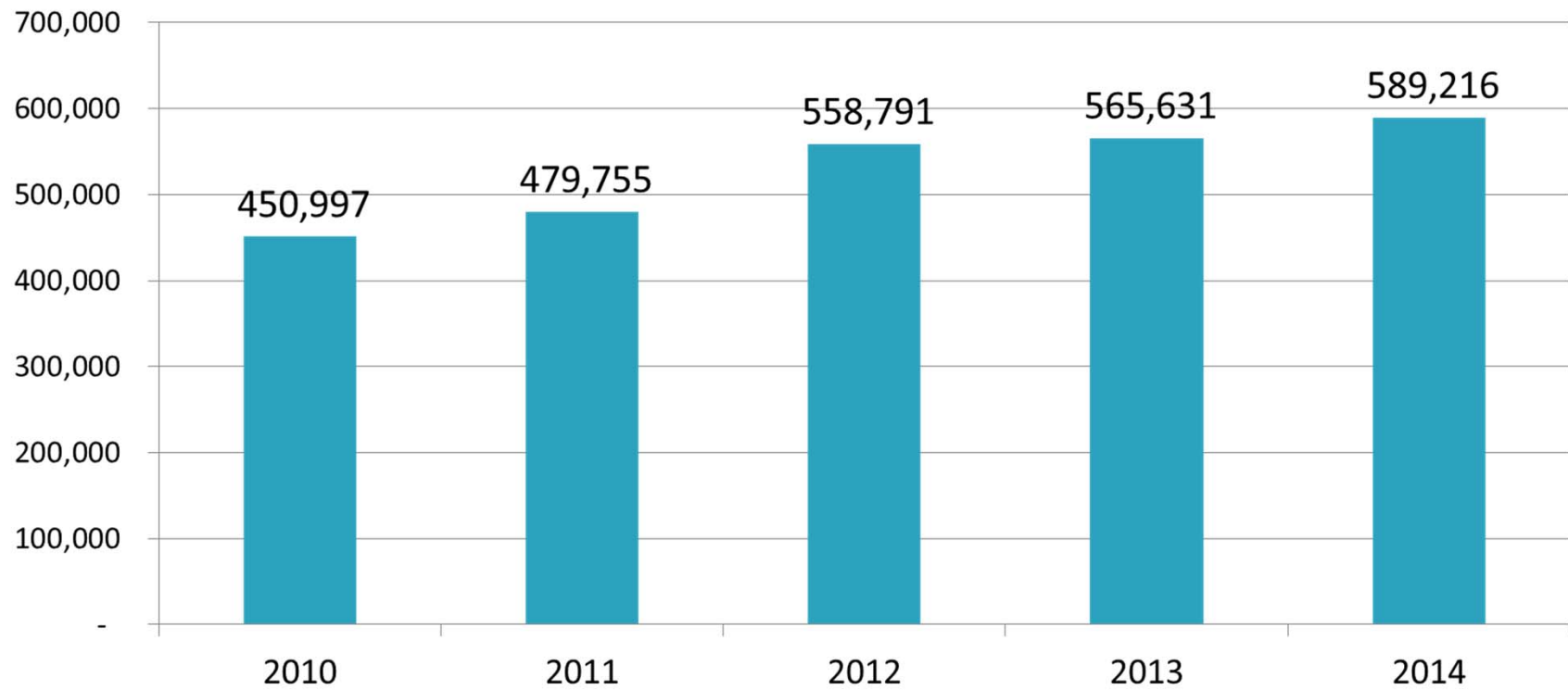


Saudi Arabia PAX Growth (Million Passengers)



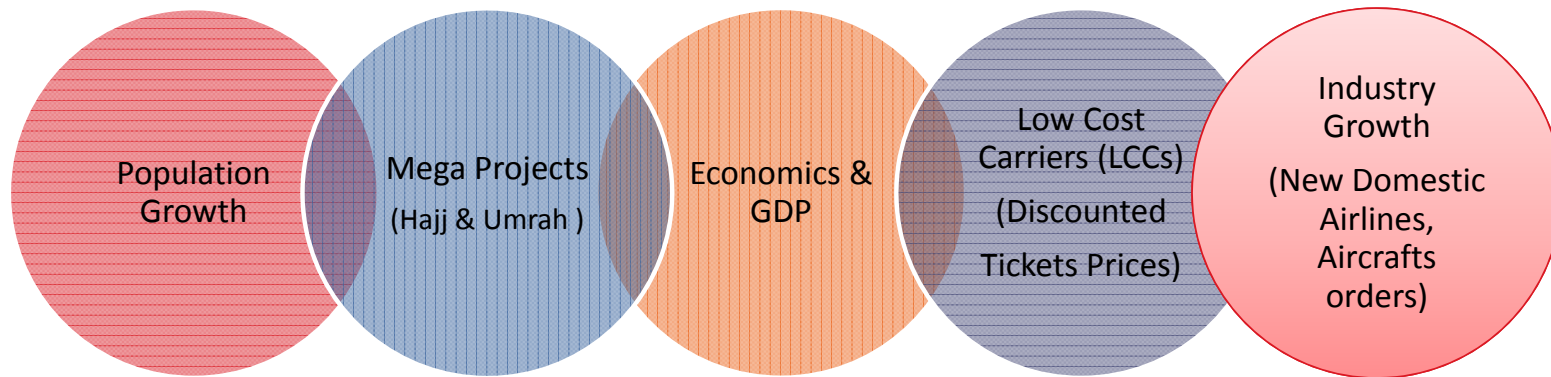
56% PAX Growth in the past 5 years

Saudi Arabia Flights Growth



31% flight growth in the past 5 years

Saudi Aviation Market Outlook & Trends



Positive Demand Factors (2014):

- Number of passenger increased by 9.7% to 74.4 million passengers
- Number of operations increased by 4.2% to 589,216 flight operations

Traffic at Saudi airports has reached 74 million passengers annually and is expected to reach 100 million by 2020

Population Growth (KSA)

Year	Population (Million)	Percent Change
1980	09.32	
1990	15.19	%63
2000	20.47	%35
2010	27.00	%28
2015	29.02	%11
2030	36.50	%25

Saudi Arabia population is estimated to maintain an annual growth rate of circa 1.6% compounded until 2030 (Research and Markets, 2011)

GDP Growth



- The average annual growth rate of real GDP during 1968–2006 was 4.9 percent compounded.
- Saudi Arabia GDP is forecasted to have growth rate between 3-4% per year during the coming five years (IMF, 2012).

Saudi Aviation Market Outlook & Trends

Qatar Airways & Gulf Air Operations expected to start by 2016

- Qatar Airways and Gulf Air have been awarded licenses to operate domestic and international flights in Saudi Arabia

Saudi Arabian Airlines - Growth

- Saudi Arabian Airline's Aircrafts Order 200 Aircrafts by 2020



Privatization Process

- Madina Airport – TAV
- Taif Airport Tender
- Future Tenders and projects

PPP & BOT

THANK YOU

