Multi-year Expert Meeting on Transport, Trade Logistics and Trade Facilitation:

8th Session: Climate Change Adaptation for Seaports in Support of the 2030 Sustainable Development Agenda

27–28 October 2020

Ministry of Transport, Saudi Arabia
Introduction and Trade Logistics

Presentation by

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Ministry of Transport
Saudi Arabia

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  - National Transport Logistic Strategy 2030
  - Ministry of Transport, Saudi Arabia

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“MY FIRST OBJECTIVE IS FOR OUR COUNTRY TO BE A PIONEER AND SUCCESSFUL GLOBAL MODEL OF EXCELLENCE, ON ALL FRONTS, AND I WILL WORK WITH YOU TO ACHIEVE THAT.”

HRH KING SALMAN BIN ABDULAZIZ AL SAUD
Custodian of the Two Holy Mosques
“All success stories start with a vision, and **Successful Visions** are based on **Strong Pillars.**”

HRH PRINCE MOHAMMED BIN SALMAN BIN ABDULAZIZ AL-SAUD

**Saudi Vision 2030**

- Our status as the heart of the Arab and Islamic worlds.
- Our leading investment capabilities
- Our strategic geographical position.
National Transport Logistic Strategy 2030

Sector’s aspiration translate into objectives and targets

- Transform KSA into a leading logistics hub
- Enable livability across the Kingdom
- Enhance financial and economical sustainability
- Improve performance of public entities

MOT is positioned as the orchestrator for the entire sector

Oversight

- Land borders
- Logistics Hub
- Logistics Services
- Air
- Sea
- Rail
- Roads

Aviation Regulators
MOT’s new mandate is centered around five pillars

<table>
<thead>
<tr>
<th>Strategy &amp; planning</th>
<th>Delivery &amp; support</th>
<th>Asset deployment &amp; investment</th>
<th>Innovation &amp; new venture</th>
<th>Logistics sector oversight</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Develops integrated sector strategy</td>
<td>• Deploys strategy &amp; interfaces with regulators and key public sector partners</td>
<td>• Oversees capital deployment plans and manages ad-hoc requests for transport infrastructure</td>
<td>• Supports development of energy &amp; environment preservation regulations</td>
<td>• Acts as a legal one-stop shop for all sector players</td>
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<tr>
<td>• Consolidates sector masterplans</td>
<td>• Manages and monitors MOT specific projects</td>
<td>• Manages MOT representation across various boards</td>
<td>• Supports development of transport safety regulations</td>
<td>• Identifies / mitigates key issues facing the sector</td>
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<tr>
<td>• Develops tools &amp; data to support planning &amp; strategy</td>
<td></td>
<td>• Manages PPP/ PSP/ alternate funding and supports funding provision</td>
<td>• Supports the development of technologies and tools</td>
<td>• Identifies capability building opportunities</td>
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<tr>
<td>• Develops &amp; manages strategic partnerships</td>
<td></td>
<td></td>
<td></td>
<td>• Shapes the development of the logistics sector</td>
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Source: MOT NTLS

- Successful Logistics Hub
- Strategic Objectives
  - Maritime Trade
  - Climate Changes
- MOT Aim

Transport logistics
NTLS has developed an optimized multimodal transportation and logistics masterplan to be a key enabler to demand drivers

- **Ports** capacity will expand to enable O/D and T/S aspiration of building a global logistics hub
- **Airports** capacity will be upgraded mainly in JED & RUH.
- **Rail** routes emerge as priority links to be deployed.
- Focused interventions on **Roads** will be sufficient to serve traffic demand till 2030
- High-quality network of **Logistic Zones/interfaces** will enable intermodal interfaces, e-commerce and other future modes of trades

### Successful Logistics Hubs

**Main dimensions for successful hubs**

- Planning and interfaces
- Digital integrated platform
- Intermodal operation
- Regulations, licensing & documentation
- Communication
- Capabilities
- Infrastructure
- Scale
- Ops. excellence
Programs have been defined to deliver on strategic objectives

Our aspirations and strategic goals for 2030

1. Position KSA as a global logistics hub
2. Enable liveability across the Kingdom
3. Enhance financial and economic sustainability

Enablers

- Improve performance of public entities

Programs have been defined to deliver on strategic objectives

A global Red Sea based marine logistics hub, centred around JIP/KAP

Position KSA as a global logistics hub

- Two-hub, world-class, aviation system, centred around two hubs in RUH and JED

Our aspirations and strategic goals for 2030

- Enhance capillarity and domestic connectivity, by deploying a targeted rail and hyperloop network, while improving quality of roads
- Enhance enablement ecosystem to improve Kingdom attractiveness as logistic platform i.e. faster and cheaper to move goods

Enable e-commerce and other future modes of trade by improving intermodal interfaces and deploying a high-quality network of logistic zones/interfaces
Maritime trade accounts for +75% of non-oil trade value and is crucial for KSA logistics aspirations

**West coast (Red Sea)**
- In the West, KSA is surrounded by relatively small economies with low trade volumes, although they lie on an important global shipping route

**East coast (Arabian Gulf)**
- East Coast growth is limited to Saudi O/D volumes as most of the GCC T/S volumes are captured by competing ports with ambitious growth plans

**Kingdom’s ports will accommodate all transportable types**

**Current ports network (2019), mil TEU**

<table>
<thead>
<tr>
<th>Ports specializations</th>
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<tbody>
<tr>
<td><strong>Multi-purpose ports</strong></td>
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<tr>
<td>Jeddah Islamic Port – Strong container and T/S component</td>
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<tr>
<td>Dammam port</td>
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<tr>
<td>Duba port</td>
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</table>

<table>
<thead>
<tr>
<th><strong>Container ports</strong></th>
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<tbody>
<tr>
<td>King Abdullah Port – Largely T/S dedicated, with minor capacity for cargo</td>
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<tr>
<td>Yanbu Commercial port (minor and part of the Yanbu port complex)</td>
</tr>
<tr>
<td>Jubail Commercial port (minor and part of the Jubail port complex)</td>
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<table>
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<tr>
<th><strong>Bulk (liquid and dry) ports</strong></th>
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<tr>
<td>Yanbu industrial port (liquid and dry bulk)</td>
</tr>
<tr>
<td>Jubail industrial port (liquid and dry bulk)</td>
</tr>
<tr>
<td>Ras Al Khair port (dry bulk)</td>
</tr>
<tr>
<td>Jizan port (dry bulk and cargo mostly)</td>
</tr>
</tbody>
</table>
Programs have been defined to deliver on strategic objectives

- One of the safest transport systems globally building on world-class infrastructure, strict regulations and a safety-culture
- Enable liveability across the Kingdom
- One of the most environment friendly systems globally building on strict regulations and a sustainability-oriented culture
- Kingdom’s main cities, amongst least congested cities globally, enabled by smart-infrastructure and tech-enabled PT
- Our aspirations and strategic goals for 2030
- Leading practices in customer experience in rail and public transportation to attract passengers from different modes, thereby reducing congestion and emissions

MOT is committed to decrease the CO2 emission and fuel consumed by passenger cars which have direct impact on climate change

There are 3 main strategic steps that KSA can take to reduce this

- Shift new passenger car sales towards electric models
- Electrify the public transport system, i.e., bus fleet
- Shape consumer behaviour to shift from passenger cars to alternative means of transport

### Millions of tones of CO2 from passenger cars in KSA, holding 2018 fleet emissions steady

<table>
<thead>
<tr>
<th>Year</th>
<th>Tons of CO2</th>
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<tbody>
<tr>
<td>2018</td>
<td>17</td>
</tr>
<tr>
<td>2030</td>
<td>22</td>
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</table>

**+26.9%**

### Billions of liters of fuel consumed by passenger cars in KSA, holding 2018 fleet emissions steady

<table>
<thead>
<tr>
<th>Year</th>
<th>Liters of Fuel</th>
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</thead>
<tbody>
<tr>
<td>2018</td>
<td>7.4</td>
</tr>
<tr>
<td>2030</td>
<td>9.4</td>
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</tbody>
</table>

**+26.9%**
MOT is committed to decrease the CO2 emission and fuel consumed by passenger cars which have direct impact on climate change in affirmative way.

MOT aim meets UNCTAD aim to translate ambitious targets into action and focus on the important issue of climate change adaptation to achieve a better and more sustainable future for all by 2030.