الهيئــة العامــة للطيران المدني
General Authority of Civil Aviation

The State of Aviation

in the Kingdom of Saudi Arabia

2024

الاســتراتيجية الوطنيــة للطيــران
SAUDI AVIATION STRATEGY

Foreword

"

In Saudi Arabia, civil aviation has emerged as powerful catalyst for economic growth and regional development, creating prosperity for all corners of the Kingdom.

Under the leadership of the Custodian of the Two Holy Mosques, King Salman bin Abdulaziz Al Saud, and His Royal Highness Crown Prince Mohammed bin Salman Al Saud, Saudi Arabia is on an ambitious journey to harness the Kingdom's strategic location and develop a diverse and sustainable economy through Vision 2030.

As part of GACA's mandate and in line with the goals of Vision 2030, we are ensuring a sustainable and well-functioning aviation system that enables the Government's economic transformation agenda.

The 2024 State of Aviation report delves into the pivotal role of civil aviation in Saudi Arabia, illustrating the profound impact of key economic actors' – airports, airlines and supporting services - both to the national economy and each of the Kingdom's 13 provinces, in terms of value added to the economy and the number of jobs.

By developing this report, the sector's direct contributions become clear, informing economic development agendas across all regions, helping to raise living standards and making life better for the Saudi people and all visitors to the Kingdom.

"

HE Abdulaziz bin Abdullah Al-Duailej

President of the General Authority of Civil Aviation (GACA)

VISION 2030 رؤية
المملكة العربية السعودية
KINGDOM OF SAUDI ARABIA

GACA
الهيئة العامة للطيران المدني
General Authority of Civil Aviation

Executive Summary

This 2024 State of Aviation report provides a national and provincial overview of the aviation industry's economic impacts on the Kingdom of Saudi Arabia in 2023. It is the first report of its kind to look at the economic contributions of the aviation sector as a whole to the economy of Saudi Arabia and its 13 provinces, using data collected by GACA for the year 2023.

In 2023, Saudi aviation emerged as a powerhouse, contributing a staggering $53 billion to the economy, constituting 5.2 percent of the country's gross value added (GVA) or 10% of Saudi's GVA from non-oil activities. This was largely driven by surging growth in tourism, including Hajj and Umrah in the Makkah Province.

In terms of employment, the aviation sector supported just under 958,000 jobs across all provinces in 2023, with Makkah, Riyadh and Eastern Province capturing approximately 87% of the sector's total economic impacts.

Overall, the Kingdom saw a record year for traffic In 2023 as 111.7 million annual passengers travelled through the country's airports. This represents a 26% growth compared to 2022.

Passenger traffic surpassed 2019 levels for the first time in October 2022 and this trend continued throughout 2023 increasing on a month-by-month basis, thanks in large part to international passenger traffic which has almost trebled since early 2022, reaching 5.7 million in December 2023.

Saudi Arabia's 2023 post-Covid recovery outperformed global averages, achieving 123% of 2019 seat capacity levels versus a global average of 90% and a Middle East average of 95%.

The Kingdom's connectivity with the world increased significantly, with international and national Saudi carriers establishing new routes to support passenger growth and connectivity. Freight volumes also increased steadily between 2022 and 2023. The strength of Saudi Arabia's aviation performance in 2023 is a testament not just to the Kingdom's growth and COVID-19 response policies, but to the increasing strength and resilience of the aviation sector.

Saudi Arabia's aviation sector will only continue to grow in 2024 and beyond as reforms summarized in this report spark further investment and growth, in support of the Kingdom's Vision 2030 agenda.

$53bn
GROSS VALUE-ADDED

958K
TOTAL JOBS GENERATED

111.7M
ANNUAL PASSENGERS

148
DESTINATIONS *

* Destination is defined here by the total number of cities that have a minimum of 52 annual flights to/from KSA.

2023 Year in Review – Accelerating investment and growth in Saudi aviation

The Saudi Aviation Strategy (SAS) drove unprecedented reform and investment milestones during the 2023 calendar year – with regulatory reforms and global initiatives accompanying significant airport, airline, and ecosystem projects throughout the year.

Regulatory and national milestones

GACA announced two significant regulatory reforms during 2023:

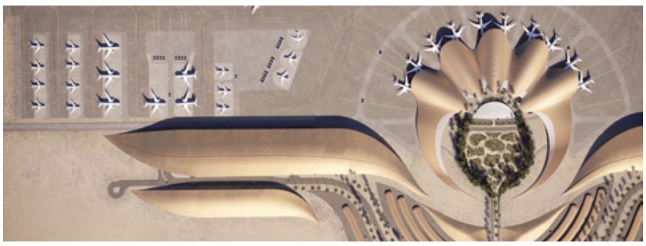
- Strengthened passenger rights protections, announced in August, with extended compensation provisions for passengers affected by travel disruptions
- The largest economic regulatory changes in fifteen years, announced in November, designed to boost competition, create open markets for growth and innovation, and increase transparency in commercial relationships and pricing.

GACA also hosted the largest ever ICAO air service negotiations event, ICAN 2023, with regulators and attendees attending from more than 100 countries, and led the establishment of the Middle East and North Africa Regional Safety Oversight Organization.

Airports

Significant airport infrastructure investments were progressed across the Kingdom's airports and terminals during the year, highlighted by:

- Progress in the King Salman International Airport Masterplan, announced in November 2022, which will accommodate up to 120 million passengers by 2030.
- The opening of Red Sea International Airport, which began operations in September in support of the Red Sea tourism industry.
- Jeddah Airport's May announcement of a significant terminal expansion, to increase capacity to 114 million passengers per year.
- The launch of the Abha Airport masterplan in October, a Public-Private Partnership to boost annual passenger capacity from 1.5 million to 13 million passengers, which received expressions of interest from more than 100 private sector partners.



Airlines

The Kingdom's airlines announced milestones that will create further growth, including:

- On 14 June GACA awarded Riyadh Air its Passenger Air Transport Economic Licence, paving the way for the Kingdom's second flag-carrier to commence operations in 2025.
- New orders for more than 150 aircraft announced by Saudi carriers Riyadh Air, Saudia, Flynas and Flyadeal during the year.

Ecosystem milestones

New technologies, investments and achievements were a feature across the rest of the Saudi ecosystem in 2023, with highlights including:

- Riyadh Integrated, a new special logistics zone launched in October 2022, secured several private sector investors to grow the Kingdom's cargo and logistics capacity.
- The first eVTOL flight test was successfully completed in NEOM in June, marking another step towards eVTOL operations in the Kingdom.
- AviLease, a Public Investment Fund aircraft lessor established in June 2022, completed the acquisition of Standard Chartered's aircraft leasing business in November.
- Saudi Arabia achieved the highest-ranking increase in global connectivity in the International Air Transport Association's 2023 Air Connectivity Index, as airlines and the Saudi Air Connectivity Program delivered new airline routes to the Kingdom.

It is already clear in this inaugural 2023 review that the Saudi aviation sector's initiatives are delivering greater benefits for passengers, the Kingdom, and the world, not solely in terms of gross-value added and jobs, but also social benefits through cultural exchange and diversity. Further editions of this report will capture the fuller impacts of these investment, infrastructure and reform achievements, with many more milestones set to be achieved in the coming years.

The Saudi Aviation Strategy's role in enabling Vision 2030

GACA is tasked with oversight of the Saudi Aviation Strategy's (SAS) implementation. The SAS is a sector strategy under the broader National Transport and Logistics Strategy (NTLS) but also works to support the realization of the National Tourism and National Investment Strategies.

Vision 2030

Launched by HRH Crown Prince Mohammed bin Salman in 2016, Vision 2030 is Saudi Arabia's comprehensive reform program that seeks to create an ambitious nation, thriving economy and vibrant society. Vision 2030 comprises 96 strategic objectives across 11 realization programs.

NTLS

The National Transport and Logistics Strategy (NTLS) was launched by HRH the Crown Prince in 2021. Overseen by the Ministry of Transport and Logistic Services, the NTLS seeks to transform the Kingdom into a global logistics hub, increasing from 6% to 10%, the sector's contribution to GDP and boosting non-oil revenue to $12 billion by 2030.

Saudi Aviation Strategy

Approved by the Council of Ministers in December 2020, the SAS is a comprehensive roadmap to establish the Kingdom as the Middle East's aviation leader by 2030 – with targets to triple passenger numbers to 330 million, double the Kingdom's connectivity to more than 250 global destinations, and expand air freight to 4.5m tons by 2030. SAS initiatives are driving change across every aspect of the aviation sector, including the expansion of airports and connectivity, increased airline capacity, investment promotion and regulatory changes to improve the passenger experience.

The KSA Aviation System: This report focuses on the following entities*:

Saudi Entities

Airports

MATARAT	RIYADH AIRPORTS COMPANY (RAC)	JEDDAH AIRPORTS COMPANY (JEDCO)	DAMMAM AIRPORTS COMPANY (DACO)	CLUSTER 2 AIRPORTS	TIBAH AIRPORTS - MED

Airlines

SAUDIA	FLYADEAL	FLYNAS	RIYADH AIR

Air Navigation

SAUDI AIR NAVIGATION SERVICES (SANS)

Ground Handling

SAUDI GROUND SERVICES

Catering

CATRION

Maintenance, overhaul and repair (MRO)

SAUDIA TECHNIC

General Aviation

Saudi Private Aviation

Flight Academies and Training Institutions

Tayaran National Aviation Academy	Prince Sultan Aviation Academy	Prince Sultan University

Saudi Tourism Entities

(Accommodation, restauration, local transport and leisure)

Foreign Entities

Foreign airlines, aviation support services and tourism entities with presence in the Kingdom

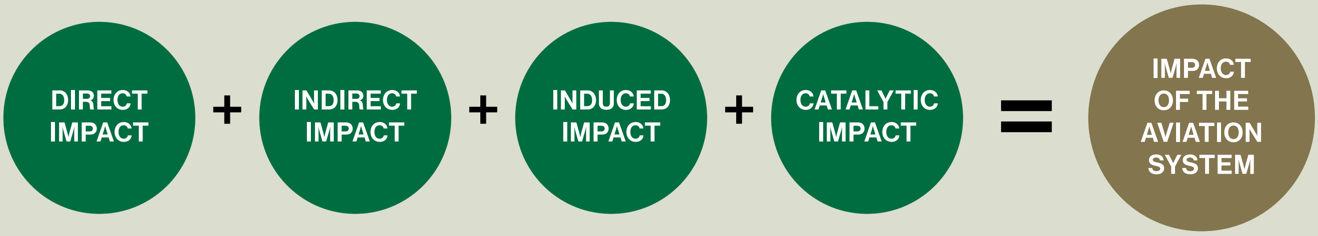
*These are the entities that fed into the economic impact analysis and the results of this report.

Valuing the economic impact of aviation

The aviation sector's impact on the Saudi Arabian economy extends beyond the services it provides to passengers and freight, and therefore a methodology capable of capturing the knock-on effects must be used to adequately account for the sector's true impact.

An economic impact analysis is a framework based on national accounting and industry best practices, which can be divided into four distinct yet related components:

- **Direct Impact:** The economic value directly attributed to the aviation sector's activities. This includes airline and airports operations, aircraft maintenance and repair, air traffic control and regulation, and other activities directly serving passengers.
- **Indirect Impact:** The value of economic activities along the supply chain supporting aviation, such as aviation fuel providers, airport construction companies, activities in the business services sector (IT, accountancies) among others.
- **Induced Impact:** The economic contribution resulting from consumer expenditure enabled by salaries and wages paid to aviation employees and those in the supply chain. These contributions support jobs and activities in a range of service industries (retail, restaurants, banks, etc).
- **Catalytic Impact:** Aviation also acts as an enabling force for tourism as it is the most important mode of transportation for domestic and international travel. The impact of tourism made possible by air transportation should therefore be accounted for in the valuation of the economic impact of aviation. This is known as the catalytic impact.



Though the levels of impact can be delineated conceptually, particular attention has been given to defining the direct and indirect impact of the aviation sector to ensure the final results are not distorted by double counting, resulting in an inflation of the overall economic impact.

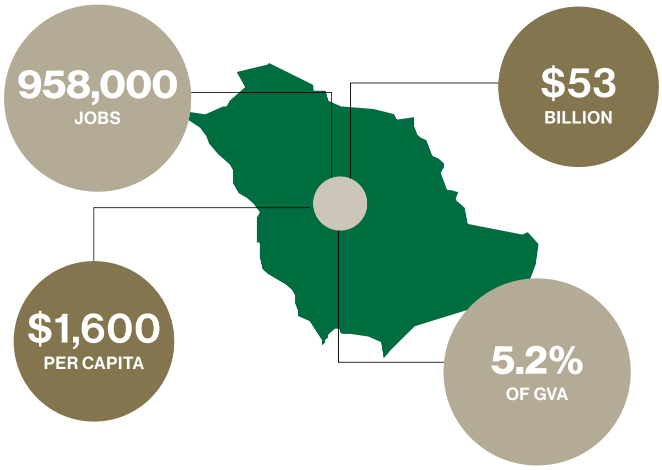
GVA vs GDP: The impact analysis undertaken measures Gross Value Added (GVA). This is a similar measure to GDP, except that GVA is measured net of taxes (e.g. VAT) and subsidies on products. For example, if a product (e.g. a plane ticket) is subsidized, then the value addition (GVA) of selling that product would be higher than the GDP impact. GVA is a standard measure of the value of goods and services produced in an economy and is reported by GASTAT alongside GDP.

Supporting economic activity and 958K jobs in 2023

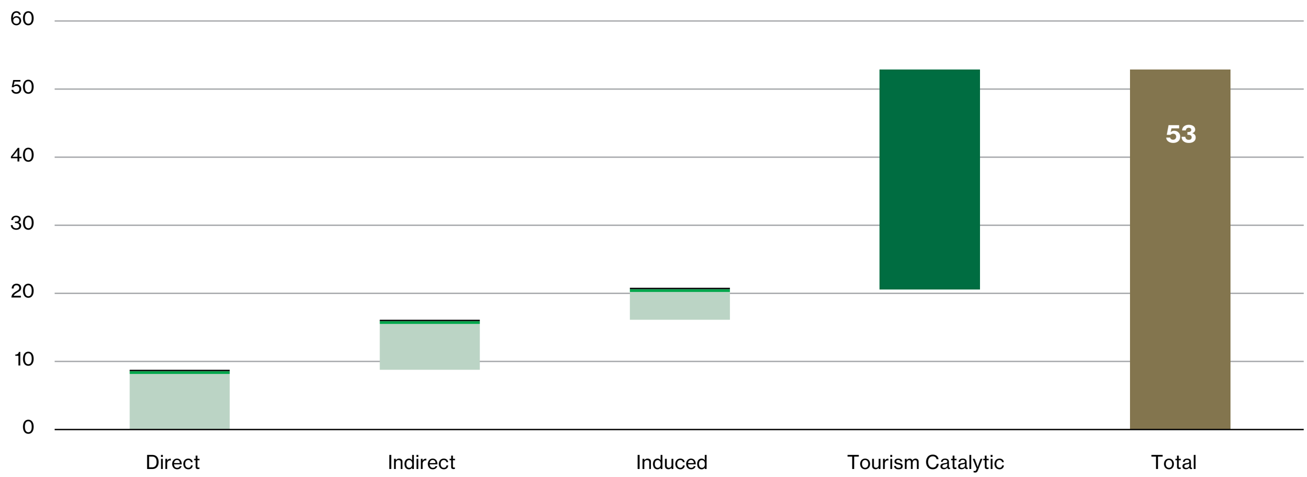
After consolidation of impacts, the economic impact of the aviation sector in Saudi Arabia is estimated to be approximately $53 billion and support 958,000 jobs, broken down by:

- **Direct impacts:** $8.9 billion and 73,000 jobs
- **Indirect and induced impacts:** $11.8 billion and 168,000 jobs
- **Tourism catalytic impacts**: $32.2 billion and 717,000 jobs

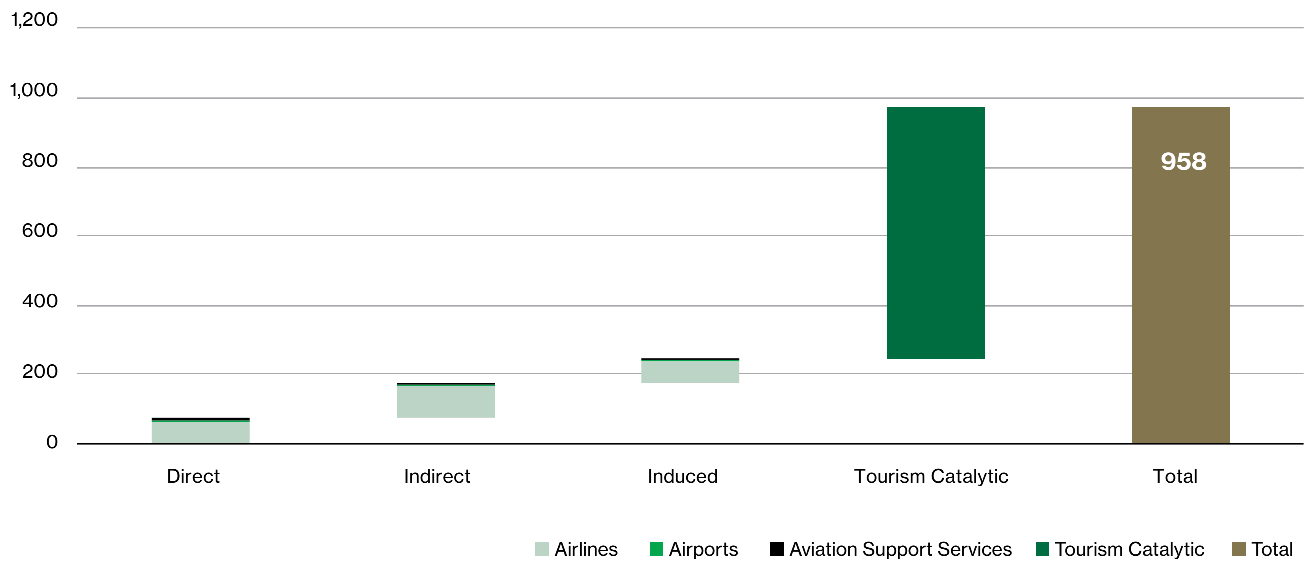
At the national level, the aggregate value addition accounts for 5.2% of Saudi Arabia's national GVA (or 10% of Saudi's GVA from non-oil activities) and represents an average of $473 per passenger.



GVA Impact of Aviation in KSA (USD billion)



Jobs Impact of Aviation in KSA ('000)



Source: GACA economic analysis. See full list of references used at the end of this report

The consolidated impacts from key actors of the aviation system: airports, airlines, support services and the tourism sector

The economic impact of the Saudi aviation sector is first and foremost the aggregation of its principal components, as illustrated below.

The total consolidated impacts are made of direct, indirect and induced impacts which avoid double counting.

Economic Actors

AIRPORTS

- Aeronautical services
- Non-aeronautical services

AIRLINES

- Domestic carriers
- International carriers

SUPPORTING SERVICES

- Air navigation services
- Ground handling
- Cargo handling
- Catering
- Maintenance, repair and overhaul (MRO)
- Fixed-based operator (FBO) / General Aviation

$21B
IN GVA

241K
JOBS

TOURISM

- Accommodation
- Restauration
- Local transport
- Leisure & entertainment

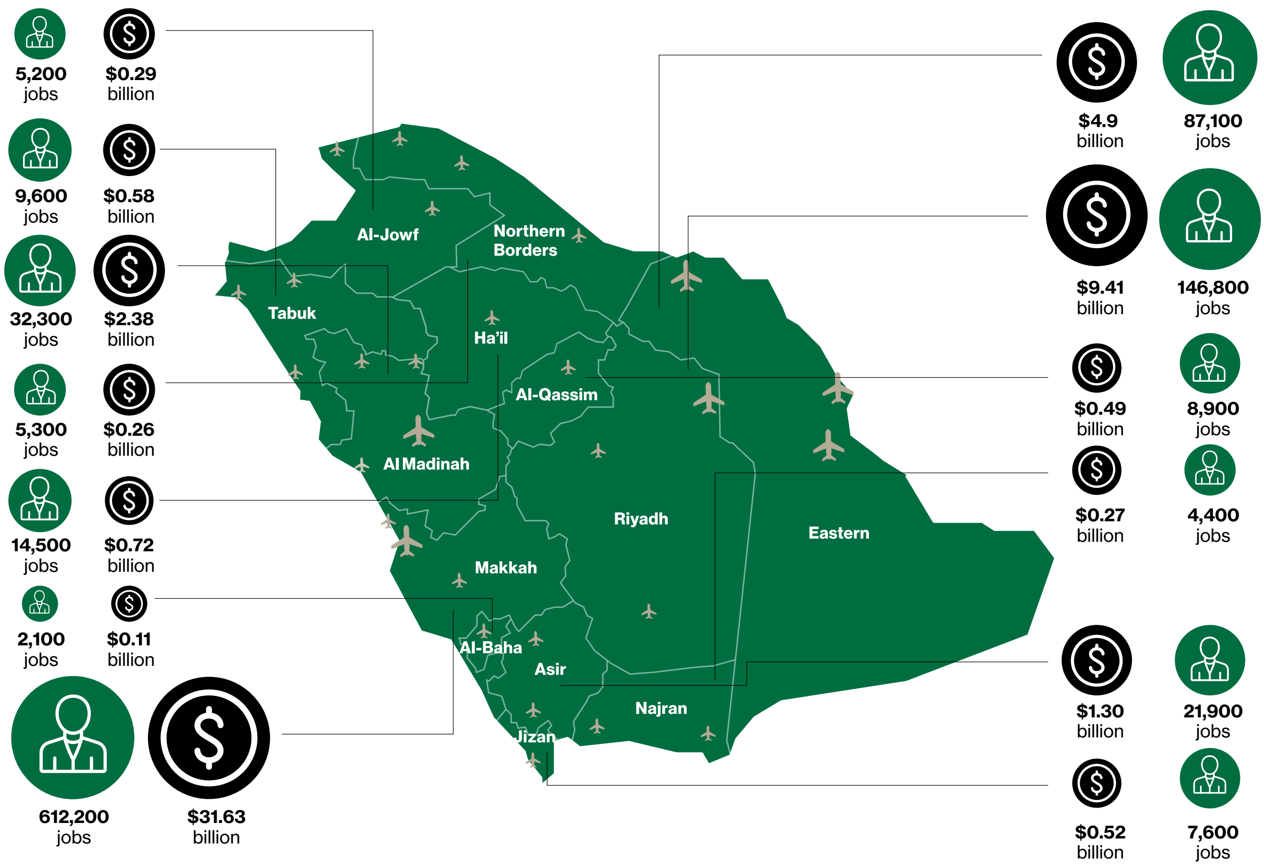
$32.2B
IN GVA

717K
JOBS

Multipliers are applied to the direct impact measured to estimate the economic contribution of aviation activities on Saudi supporting industries and supply chains.

Benefits and opportunities for the entire Saudi economy

Summary of Economic Impacts at the Provincial Level (by GVA in black and jobs in green) - Based on 2023 data.



Around 60% of the GVA impact (mostly due to tourism catalytic impacts) and 75% of jobs can be allocated at the provincial level.

The remainder has been allocated based on passenger traffic. At the provincial level, the analysis shows that:

- A large majority of impacts are accruing in Makkah Province.
- Riyadh and Eastern Province accrue 18% and 9% of impacts respectively.
- The remaining 10 provinces capture 13% of total impacts.

Source: GACA economic analysis. See full list of references used at the end of this report

Comparing aviation's impacts in 2023 and 2022

Based on the most recent passenger and tourist numbers available, Saudi Arabia's growth and recovery trajectory continued in 2023 with a growth of 23 million passengers from 2022.

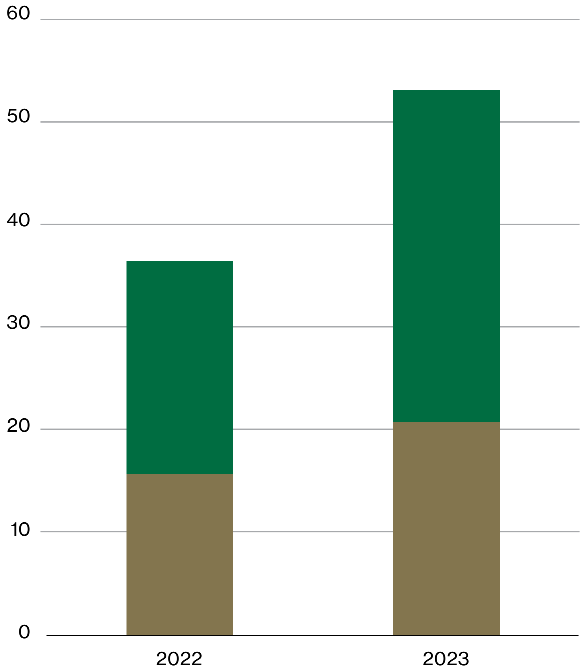
This means that the economic impacts from aviation also grew and supported:

- Up to $53 billion in GVA with $32 billion of that related to tourism catalytic impacts
- 958,000 jobs with 717,000 of those related to tourism catalytic impacts.

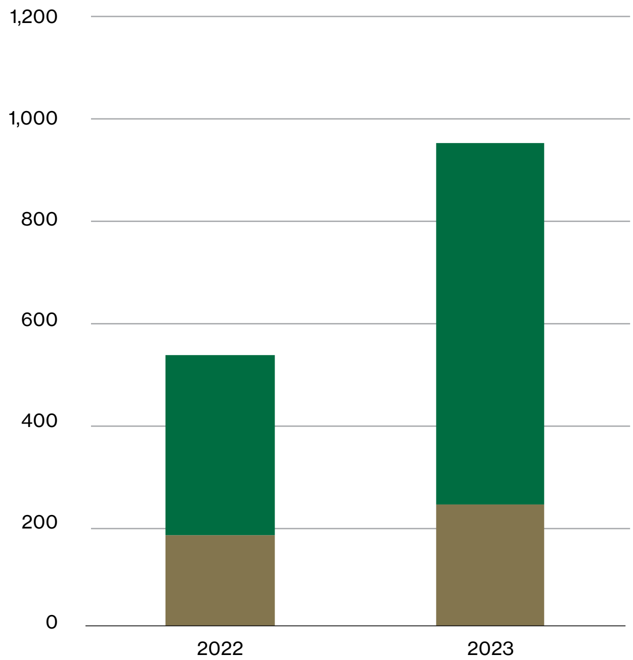
	2022	2023
International pax	41.6 M	60.6 M
Domestic pax	46.9 M	51.1 M
In-bound tourists*	9.5 M	17 M
Domestic tourists*	7.5 M	10.3 M

Travelling by air

GVA Impact of Aviation in KSA (USD billion)



Jobs Impact of Aviation in KSA ('000)



■ Direct, indirect, induced ■ Tourism catalytic

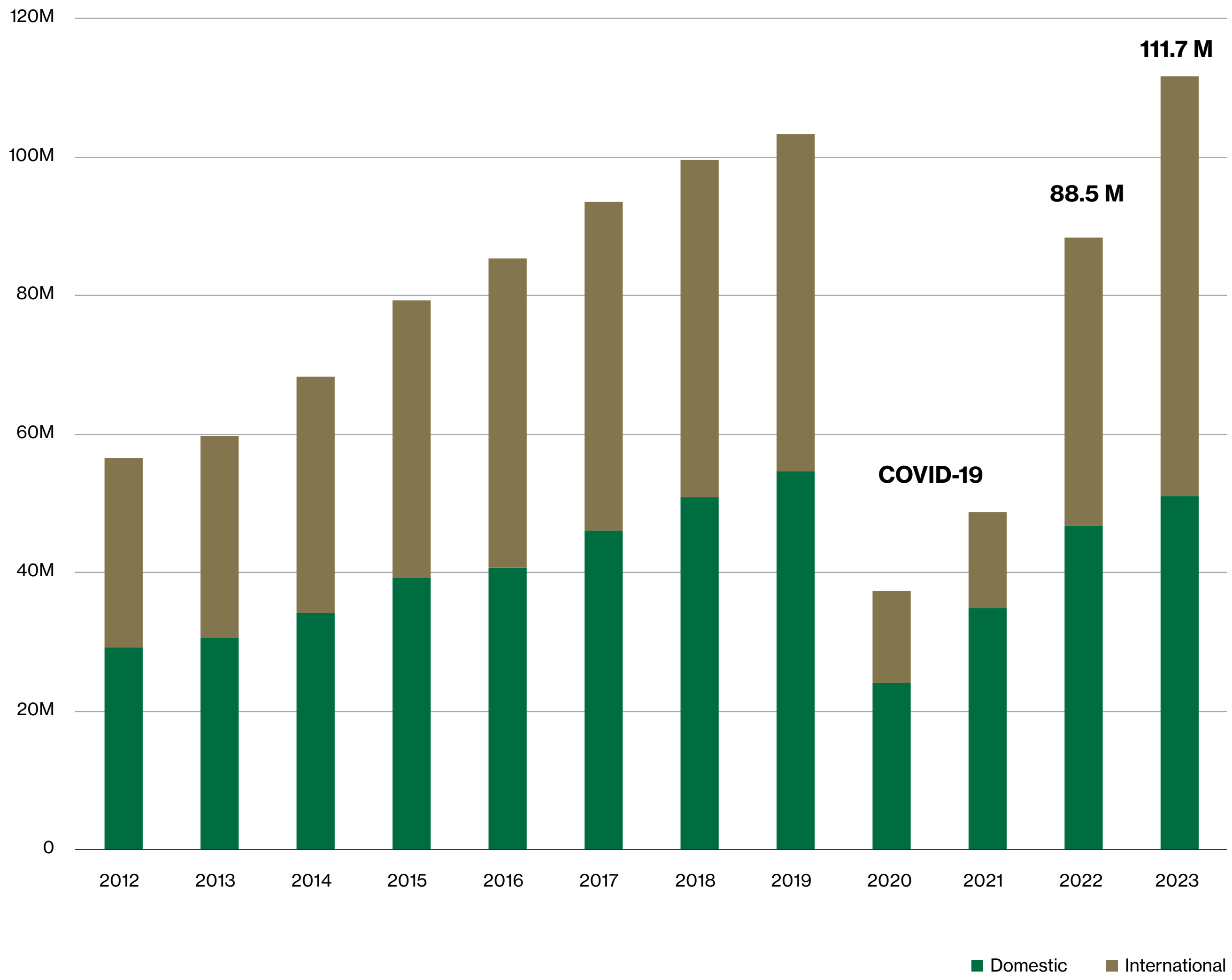
Source: GACA economic analysis. See full list of references used at the end of this report


Saudia
السعودية
Saudia
السعودية
HZ-ARA
HZ-ARA
DREAMLINER

Passenger levels exceeded pre-pandemic levels

In 2023, total passenger traffic reached 111.7 million, up from 88.5 million in 2022, with international passenger numbers showing the greatest recovery, reaching 60.6 million and domestic passengers reaching 51.1 million. Transit passenger volumes remained minimal.
After two years of travel restrictions due to the COVID-19 pandemic, total month-on-month passenger traffic surpassed 2019 in October 2022.
Since then, monthly traffic levels have been higher than 2019.
The Kingdom is well on its way to expand international, domestic and transit passenger volumes in 2024 and beyond.

Historical Passenger Traffic Breakdown for KSA (2012-2023)



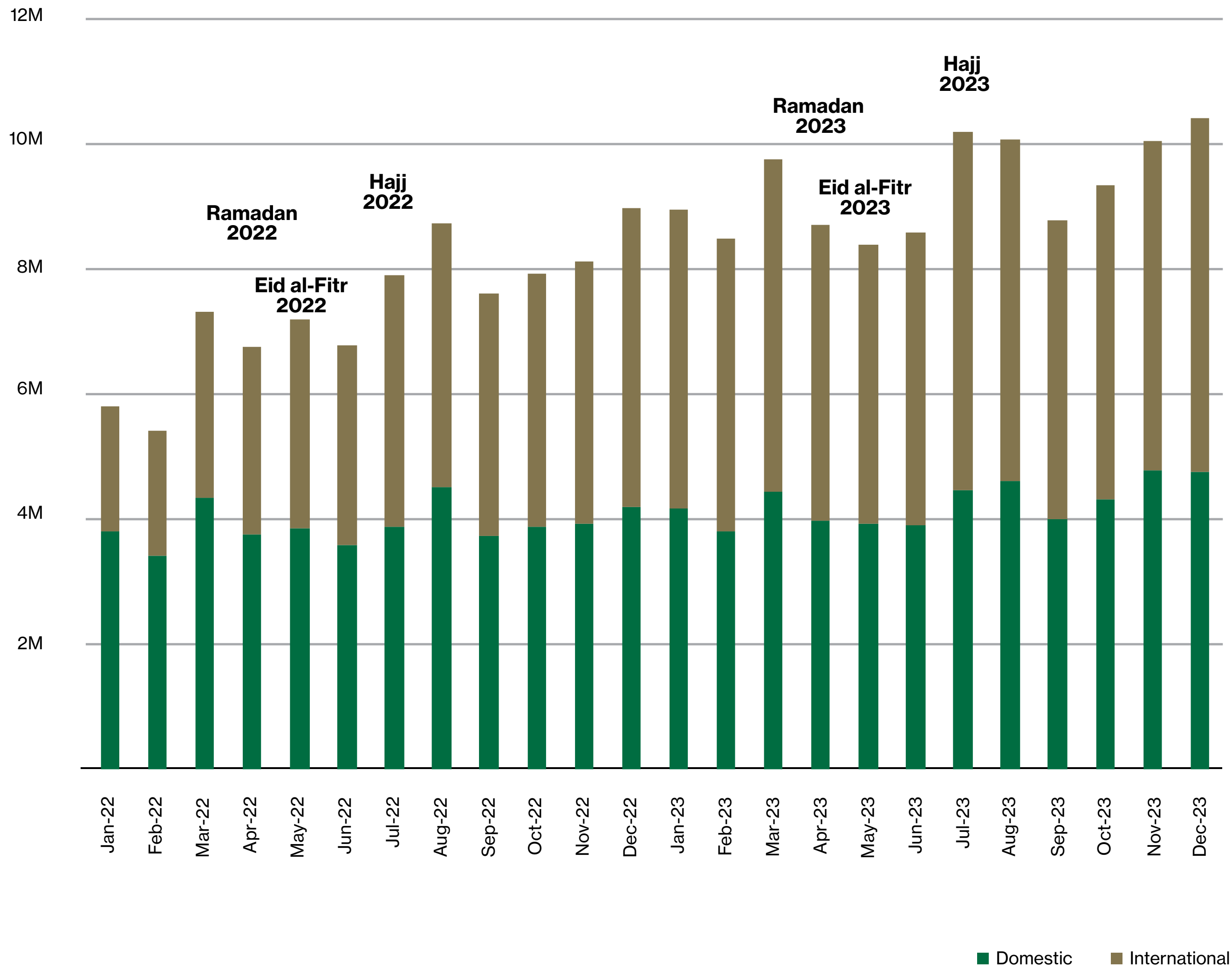
Source: GACA

Steady growth in international passenger traffic since January 2022

On a month-to-month basis, total passenger traffic in Saudi Arabia rose from just under 6 million passengers in January 2022 to over 10 million in December 2023.

While domestic passenger volumes remained relatively stable with some seasonal increases, international passenger traffic almost tripled, reaching 5.7 million in December 2023. This trend is expected to continue into 2024 with the opening of several new routes and airport expansions.

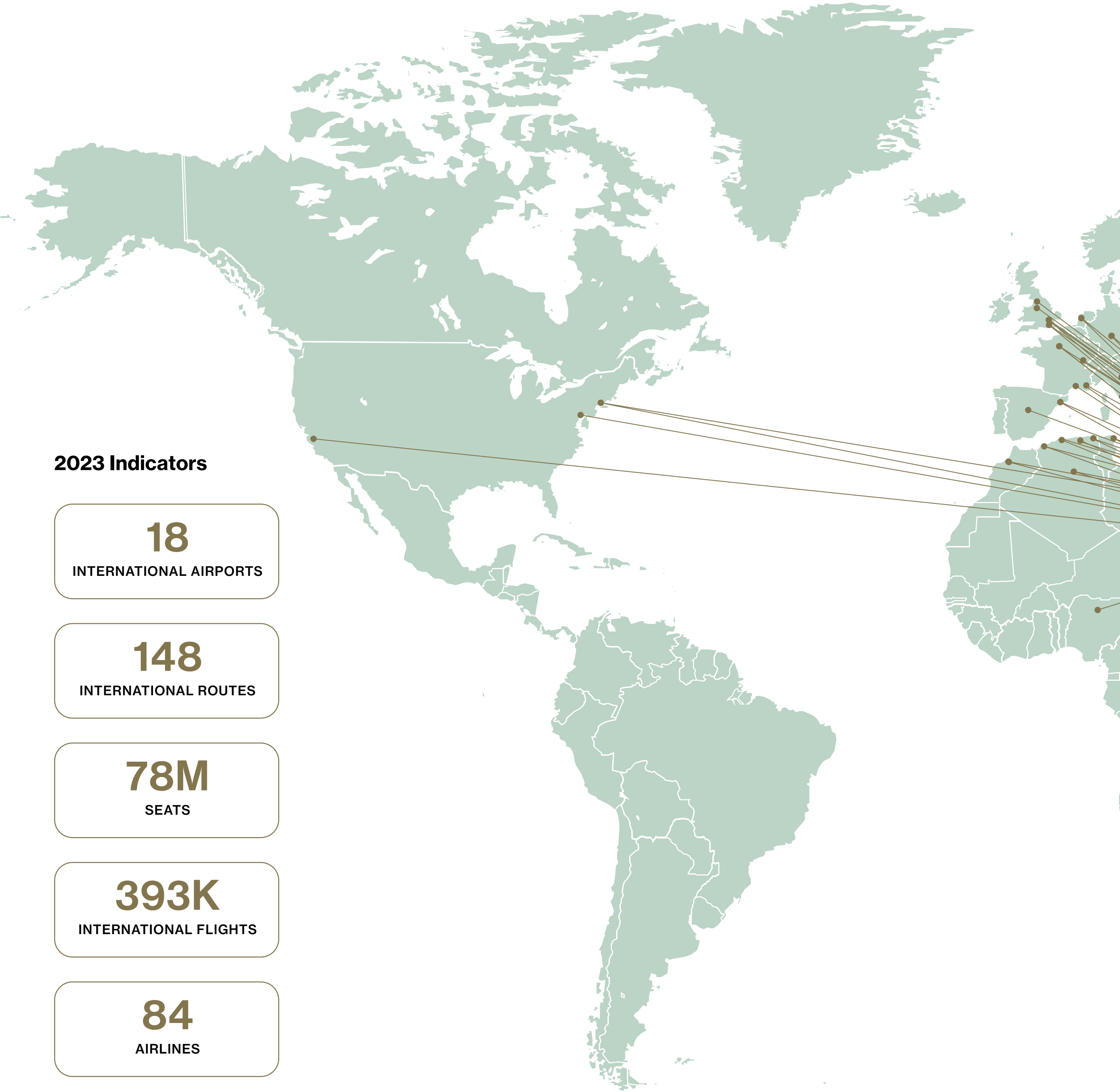
Total Monthly Passenger Traffic in KSA – 2022-2023



Total Monthly Passenger Traffic in KSA – 2022-2023

Source: GACA

Saudi Arabia international air connectivity in 2023



2023 Indicators

18
INTERNATIONAL AIRPORTS

148
INTERNATIONAL ROUTES

78M
SEATS

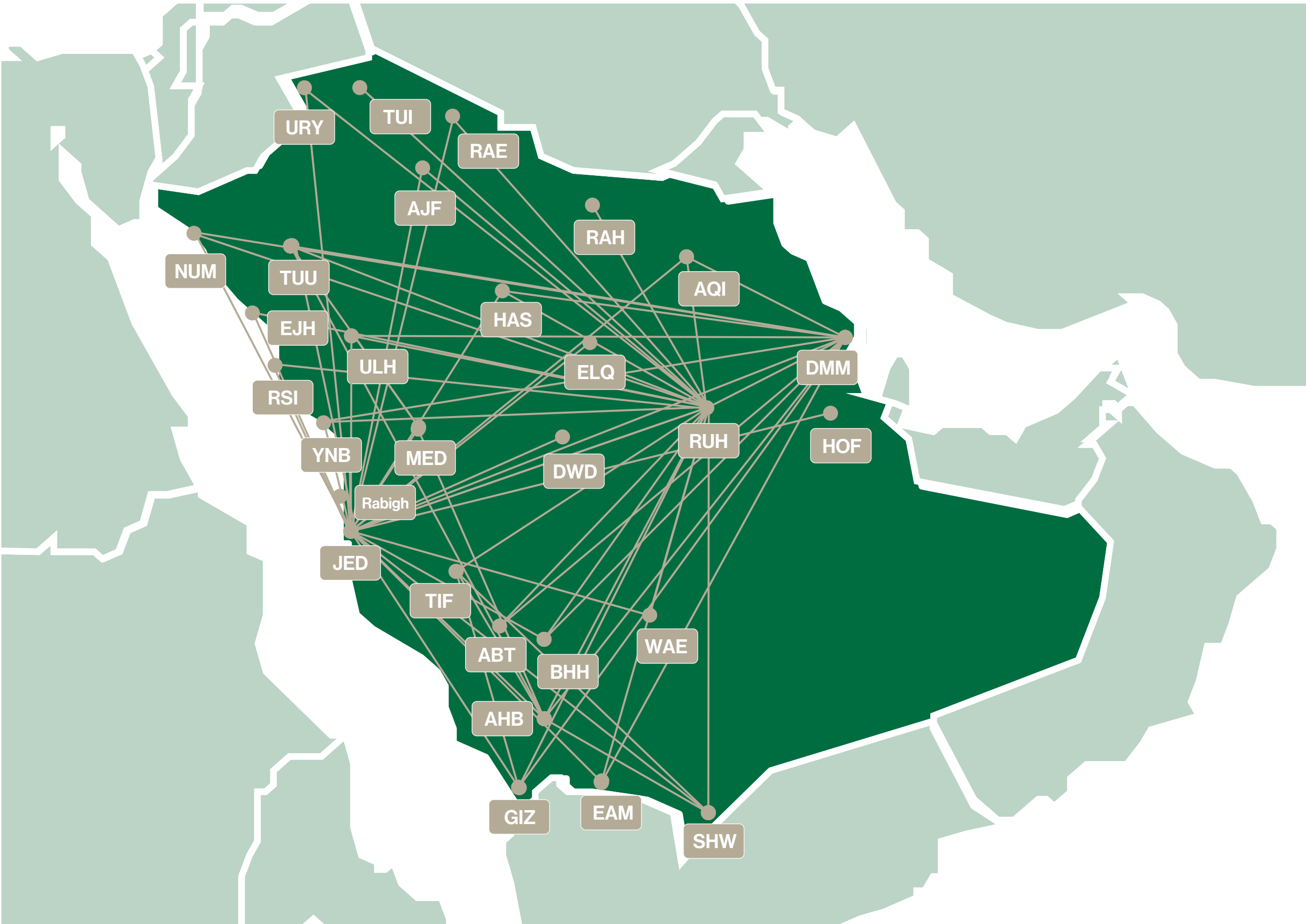
393K
INTERNATIONAL FLIGHTS

84
AIRLINES

59
COUNTRIES

Source: OAG, GACA

Saudi Arabia domestic air connectivity in 2023



2023 Route Indicators

29	AIRPORTS
142	DOMESTIC ROUTES
75M	SEATS
422K	DOMESTIC FLIGHTS
3	AIRLINES
13	PROVINCES

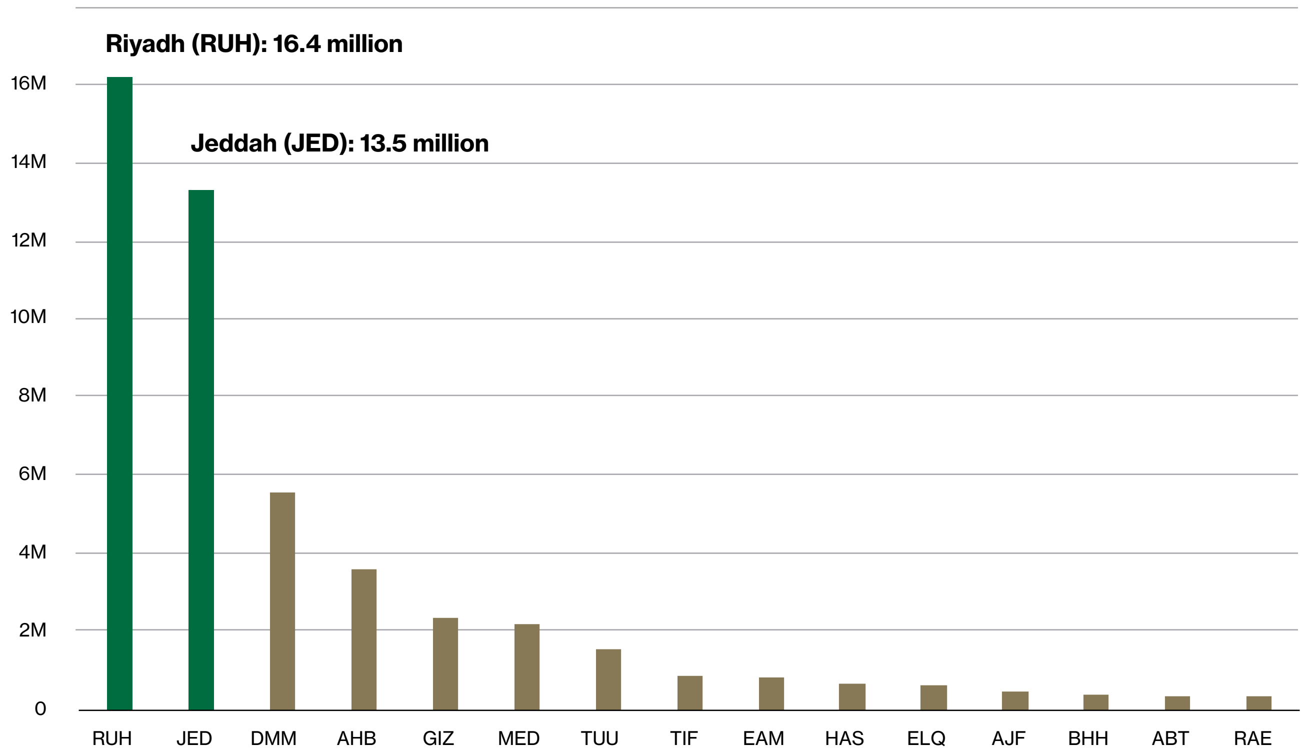
Source: GACA

Top 15 domestic airports in 2023

Top 15 domestic airports in the Kingdom (by number of annual passengers) in 2023

In terms of number of passengers carried domestically, Riyadh Airport and Jeddah Airport were gateways for 16.4 and 13.5 million domestic passengers respectively, making up 58% of total domestic passenger volumes in 2023. Dammam Airport, Abha Airport and Jizan Airport filled the other top 5 spots.

In terms of seats, Jeddah-Cairo and Riyadh-Dubai were both in the top 10 busiest international routes globally, while Riyadh-Jeddah was in the top 10 busiest domestic routes worldwide for 2023.



Source: GACA, OAG

Total passenger traffic and air cargo volumes in 2023 by province (in millions)

Al Jawf
Total Intl Passengers: 0.1 M
Dom Passengers: 0.6 M

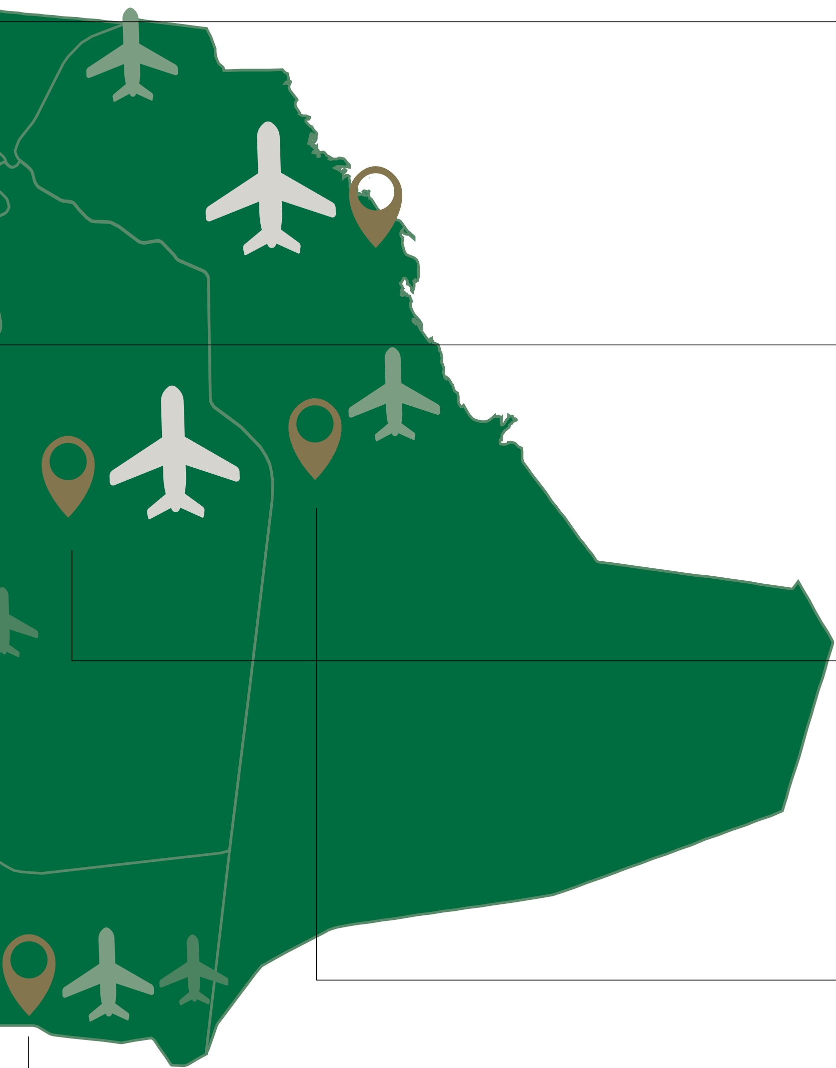
Tabuk
Total Intl Passengers: 0.4 M
Dom Passengers: 1.6 M

Al Madinah
Total Intl Passengers: 7.6 M
Dom Passengers: 2.5 M

Makkah
Total Intl Passengers: 30 M
Dom Passengers: 14.4 M
Cargo: 0.4 M tons

Al Bahah
Total Dom Passengers: 0.3 M

Jizan
Total Intl Passengers: 0.1 M
Dom Passengers: 2.3 M



Al Hudud Ash Shamaliyah (Northern Borders Province)
Total Dom Passengers: 0.5 M

Ha'il
Total Intl Passengers: 0.2 M
Dom Passengers: 0.7 M

Al Qasim
Total Intl Passengers: 0.7 M
Dom Passengers: 0.6 M

Riyadh
Total Intl Passengers: 15.5 M
Total Dom Passengers: 16.6 M
Total Cargo: 0.4 M tons

Ash Sharqiyah (Eastern Province)
Total Intl Passengers: 5.6 M
Total Dom Passengers: 6 M
Total Cargo: 0.1 M

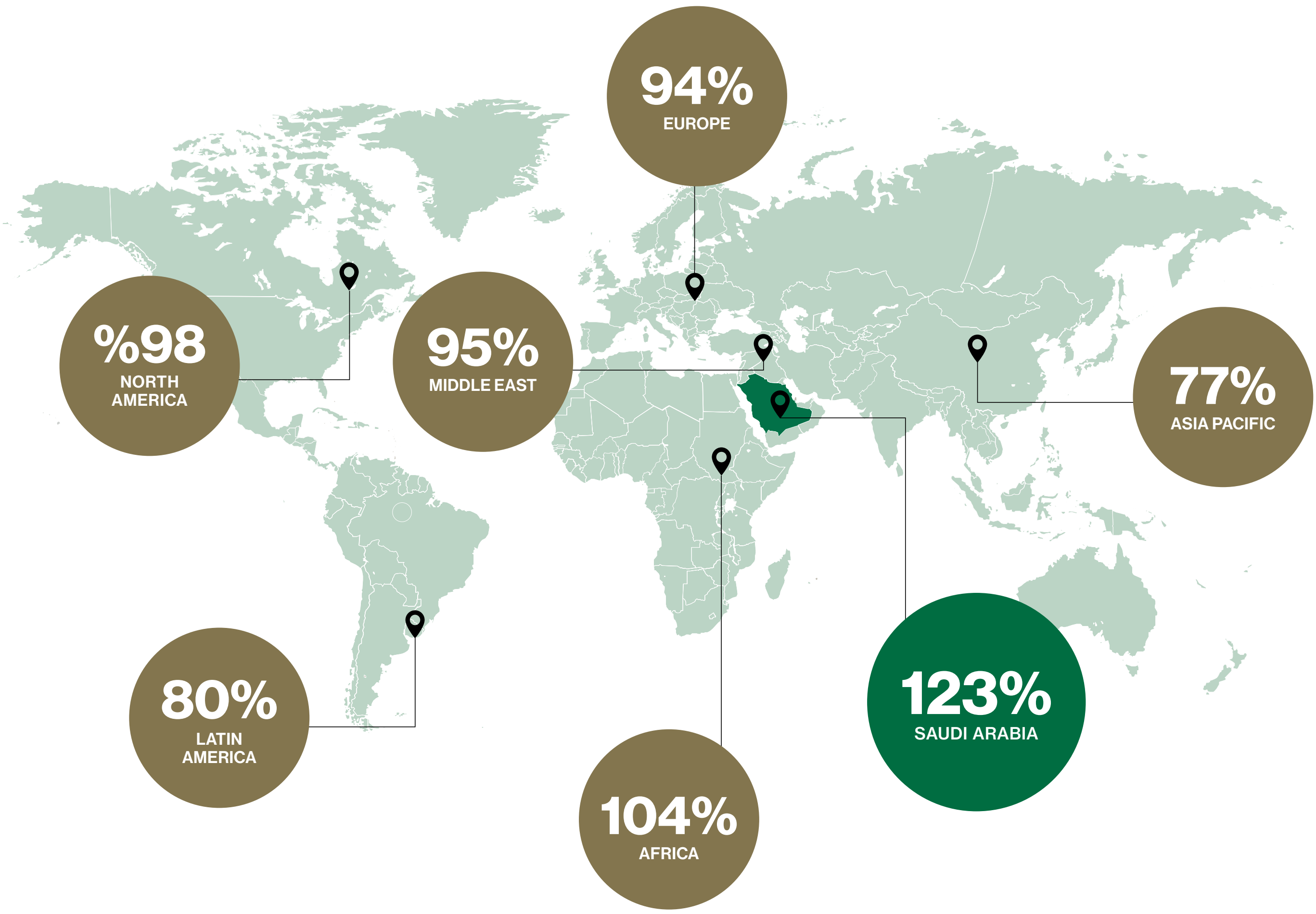
Asir
Total Intl Passengers: 0.4 M
Total Dom Passengers: 3.9 M

Najran
Total Intl Passengers: 0.02 M
Total Dom Passengers: 1.1 M

Source: GACA

A world leading recovery from COVID-19

The Kingdom's recovery rate in 2023 in terms of international seats was 123% of 2019 levels, far ahead of the global recovery rate of 90%.



Global average recovery rate from COVID-19

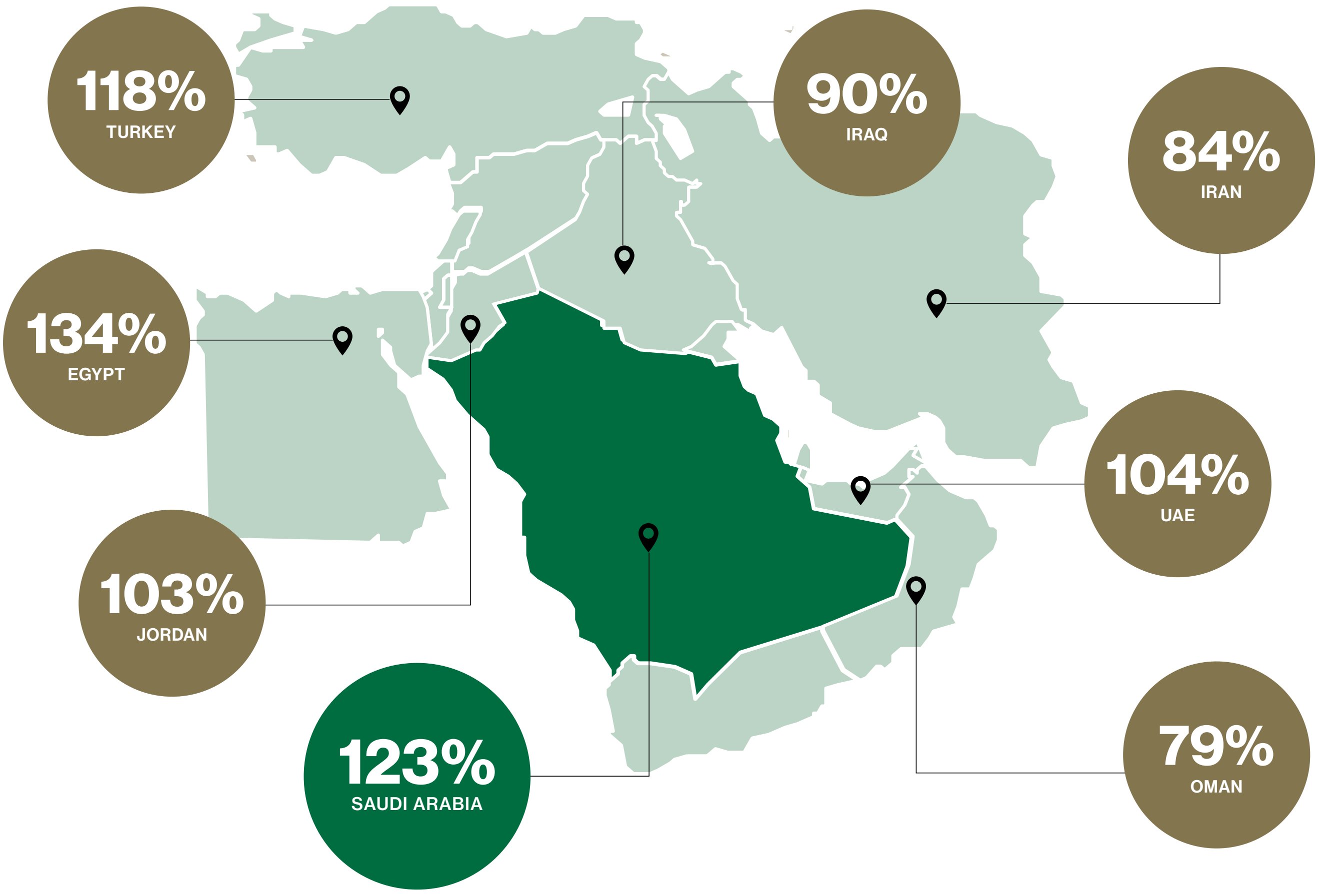
90%

GLOBAL

REGION	INTERNATIONAL SEATS 2019	INTERNATIONAL SEATS 2023	RECOVERY
KSA	63,423,781	78,025,659	**123%**
Africa	107,056,747	110,962,571	**104%**
North America	194,651,153	190,871,224	**98%**
Middle East	137,060,311	129,742,571	**95%**
Europe	1,052,498,631	991,092,622	**94%**
Latin America	194,849,082	156,727,014	**80%**
Asia-Pacific	613,496,572	472,429,348	**77%**
Global	**2,363,036,277**	**2,129,851,009**	**90%**

 Source: OAG

In 2023, Saudi Arabia ranked second in regional recovery for international seats



COUNTRY	INTERNATIONAL SEATS 2019	INTERNATIONAL SEATS 2023	RECOVERY
Egypt	34,910,902	46,787,750	**134%**
Saudi Arabia	63,423,781	78,025,659	**123%**
Turkiye	118,815,231	140,443,534	**118%**
United Arab Emirates	151,495,625	157,714,712	**104%**
Jordan	11,993,264	12,363,320	**103%**
Iraq	11,257,355	10,168,148	**90%**
Iran	11,514,034	9,806,762	**85%**
Oman	20,758,984	16,416,129	**79%**

Source: OAG


SNB

List of Acronyms

CAPEX	Capital expenditure or expense
DACO	Dammam Airports Company
DMM	Dammam International Airport
FBO	Fixed Based Operator
GACA	General Authority of Civil Aviation
GDP	Gross Domestic Product
GVA	Gross Value-Added
HRH	His / Her Royal Highness
IATA	International Air Transportation Association
ICAO	International Civil Aviation Organisation
JED	Jeddah International Airport
JEDCO	Jeddah Airports Company
KSA	Kingdom of Saudi Arabia
LCC	Low-cost Carrier
MRO	Maintenance, Repair and Overhaul
NTLS	National Transport and Logistics Strategy
OAG	Official Aviation Guide (database)
PAX	Passengers
RAC	Riyadh Airports Company
RUH	Riyadh International Airport
SACC	Saudi Airlines Catering Company
SANS	Saudi Air Navigation Services
SAR	Saudi Riyal
SAS	Saudi Aviation Strategy
SGS	Saudi Ground Services
SPA	Saudi Private Aviation
USD	United States Dollar
WEF	World Economic Forum

References

In addition to the list of direct references acquired below, a large portion of the datasets and confidential information acquired to perform this state of aviation report was acquired at GACA or, upon formal request, provided directly to GACA authorities by local national sources made up of the following entities:

Ministry of Tourism & KSA Tourism Authority,

Matarat, Riyadh Airport, Jeddah Airport, Dammam

Airport, Madinah Airport / Tibah Airports Ltd, Cluster 2 Airports,

Saudi Academy of Civil Aviation (SACA),

Saudi Logistics Services (SAL),

Saudi Air Navigation Services (SANS),

Saudia

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