

GCC Automotive Logistics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

Key Highlights

The GCC automotive logistics market is estimated to register a CAGR of more than 4.5% during the forecast period. The Middle East is one of the most important markets for automotive manufacturers. Right from entry-level carmakers that focus on mass-market products to companies with a premium product lineup, every brand wants to gain and increase its market share in this region. Saudi Arabia remains a very important market for US automakers.

Gulf Cooperation Council (GCC) countries like Saudi Arabia and the United Arab Emirates are expanding their import and premium vehicle markets. They also witness rising aftermarket and second-hand vehicle volumes. Thus, logistics will be the key to further unlocking the automotive industry's potential in the region.

Manufacturers and distributors depend on seamless flows to satisfy customer expectations and just-in-time supply chains and access the technologies that drive change across the global automotive industry, including electrification, autonomous, and connectivity.

In the Gulf region, especially in Israel, Jordan, Oman, Saudi Arabia, and the United Arab Emirates, electric and hybrid means of transportation have gained popularity. The UAE government is taking steps to lessen road travel's impact on the environment, making the nation a prime site for promoting green mobility solutions (objectives include having 10% of Dubai's vehicles be electric by 2030).

GCC Automotive Logistics Market Trends

Growth in E-commerce to Drive the Logistics and Transportation Sector

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The UAE has established itself as one of the world's fastest-growing e-commerce markets during the past few years. It is now the Middle East and North Africa's most developed e-commerce market, with an anticipated annual growth rate of 18% between 2020 and 2025.

With Saudi Vision 2030, the Saudi government is actively working to reform governance structures and regulations, paving the way for market liberalization and private sector participation. The government will be more open to issuing licenses to full-fledged foreign logistics companies.

With government initiatives, new entrants are expected to fill gaps across the Saudi logistics landscape. This vision also includes the creation of greenfield sites and cities. One of the most notable projects is the King Abdullah Economic City, which primarily focuses on industry and logistics. It is located about 70km North of the Red Sea port city of Jeddah. The city has its own seaport, King Abdullah Port, with a current capacity of 1.4 million TEUs and a target capacity of 10 million TEUs.

New business models are likely to emerge as more companies expand due to the expansion of contactless services and a boom in e-commerce, and further advancement in this field will have a significant impact on the automotive industry in the region.

Increasing Penetration of Electric Vehicles in Gulf Countries

Electric and hybrid modes of transport are gaining momentum in the Gulf region and particularly in Israel, Jordan, Oman, Saudi Arabia, and UAE. The UAE government has already started making efforts to reduce the contribution of road transport to its footprint; so that it makes the country an ideal location to push the adoption rate of green mobility solutions (objective to reach 10% of EVs by 2030 in Dubai).

The Middle East is known for its oil and gas but the adoption of electric cars is expected to gain momentum through the forecast period. Low fuel prices and the passion for speed, and luxurious automobiles in the region have meant that drivers have been relatively slow to shift to electric vehicles especially compared to their counterparts in markets, like China. However, the adoption of electric cars is set to enter the fast lane in the Gulf, especially in tech-savvy urban hubs like Dubai.

As EVs are in the nascent stage in the country, the country has not yet set out incentives for the deployment of EVs, such as free charging stations, Greenbank loans, etc. EV incentives are yet to be developed, especially when EV deployment starts on a commercial scale. However, the country has taken a few initiatives which are likely to boost the EV demand in the country. For instance, Saudi Electricity Company has signed a deal with Nissan Motor, Takaoka Tokyo, and Tokyo Electric Power Company for the first EV pilot project in Saudi Arabia. Reportedly, the agreement provides for the development of fast-charger EV stations

Saudi Arabia has signed a memorandum of understanding (MoU) with the UK in a move to reduce carbon emissions and support Saudi Vision 2030. The MoU commits both countries to cooperate and share expertise to develop technologies including smart grids and EVs.

UAE is another most developed market for EVs, not only regarding sales but also regarding charging infrastructure, with Dubai having some 200 charging stations and Abu Dhabi around 20. The UAE government is targeting to have 42,000 electric cars on the roads in a few years.

GCC Automotive Logistics Market Competitor Analysis

The GCC automotive logistics market is fragmented. The market is expected to grow during the forecast period due to the growing demand for electric vehicles and other similar factors. International players are dominant in the market, with the topmost players in the market being Ceva Logistics, DB Schenker, DHL, DSV, and Geodis.

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The UAE's rules on vehicle imports, low gasoline prices, low import taxes, high per capita disposable income, and a favorable tax structure draw automotive companies to Dubai and the United Arab Emirates. These elements contribute to the nation's reputation as one of the Gulf region's largest passenger vehicle markets.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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