

## **KSA Location-based Services - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

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### **Report description:**

The KSA location-based services market is projected to grow from an estimated USD 0.31 billion to USD 0.67 billion at a CAGR of 14% during the projected years.

#### Key Highlights

- The infrastructural development in the KSA and the digitalization trend in the country's business landscape are fueling the market of location-based services in the country due to their application in urban planning, location-based advertising, and business intelligence, among others.
- The country has been investing and prioritizing the development of intelligent cities and infrastructure in line with the objective of Saudi's Vision 2030, which is driving market growth because the integration of location-based services in smart city infrastructure can use real-time geospatial data to provide valuable insights and enable more informed decision-making in various aspects of urban planning and development.
- The digitalization trend in the country has increased the adoption of one-to-one advertising techniques using geo-fencing and other location-based solutions in the country are fuelling the adoption of location-based solutions in the retail, healthcare, BFSIs, and other sectors in Saudi Arabia. For instance, in October 2022, the Saudi Central Bank published a report on the Counter-Fraud Framework in the country's BFSI sector by stating the importance of using mobile device geolocation data to require verification if a user attempts to access products and services out of its regular location. In addition, geofencing technology and location-based solutions can restrict access to online or mobile services based on the user's geographical location, which drives the demand for the market in the country.
- Additionally, in September 2023, India-based Genesys International secured an order worth USD 8.05 million from Saudi-listed Al Moammar Information Systems (MIS) to provide advanced national mapping services. Furthermore, the company established a subsidiary in the Kingdom, as Saudi Arabia undertakes extensive infrastructure and urban planning initiatives, which shows the

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demand for location-based solutions for the country's infrastructural mapping applications, driving market growth in the future.

- However, the location-based solutions use communication networks to operate and need private information from the smart devices used for collecting data regarding city planning or making personalized advertisement campaigns, which are vulnerable to data privacy breaches and cyber attacks, restricting the market growth in the country due to the rising concern on cyber security in the country.
- The COVID-19 pandemic raised the demand for Location-based services in the country due to their applications in providing strategic indoor and outdoor location insights about people, space, and equipment across the industries and public service sectors, including life sciences, technology, hospitals, and medical facilities, financial institutions, data centers, and intelligent commercial office buildings. Additionally, in monitoring COVID-19 infections, location based services had the application to track the movement of people and analyze this data to understand their activities during the pandemic, supporting the market growth in the country.

## KSA Location-based Services Market Trends

### The development of Smart City Projects in The Country is Driving the Market Growth

- The growth of urbanization in the country through intelligent city development has supported the adoption of the Internet of Things and other digital technologies to enhance the quality of life of the residents to promote sustainable development and improve the efficiency of urban services, creating an opportunity for the market growth of location-based services in the country because it can be used in enhancing the delivery of public services in the cities.
- In addition, location-based services' application in creating detailed maps and visualizations of urban areas can help city planners and decision-makers better understand the spatial distribution of various resources, services, and infrastructure, which would increase during the forecast period due to the infrastructural growth in the kingdom of Saudi Arabia.
- The location-based services can be used to identify patterns of land use, transportation networks, and population density, which can inform the development of more efficient and sustainable urban designs, and the country's investment in urban planning through smart city construction would fuel market growth.
- For instance, in January 2023, the Saudi Arabia General Authority for Survey and Geospatial Information stated that Esri, a market vendor for location-based services, has partnered to deliver its solutions across the country's intelligent city projects, such as NEOM, AMAALA, the Red Sea Project, the Diriyah project and AIUla project, among others in the country.
- Furthermore, location-based services can promote social inclusion by providing personalized and context-aware services to the vulnerable populations of the KSA, such as low-income residents. For instance, LBS can help address the specific needs and challenges these groups face and ensure equal access to urban resources, creating a growth opportunity for the market in the country due to the country's priority in economic development through urban planning in line with the country's Vision 2030.

### Transportation and Logistics Sector Contributes Significantly to the Market Growth

- Location-based services are being increasingly used in the country's companies that want to optimize their fleet management efforts. These solutions can track drivers' location and estimate their arrival time at the designated spot, thereby monitoring travel times. For instance, in January 2023, the country's public transportation authority partnered with Wasl, an e-platform to track and control light vehicles and trucks and land transport operations, which has integrated its solution to a cloud platform named Wialon for better monitoring, showing the demand for location-based tracking solutions in the logistics and transportation sector in the country.
- In addition, advanced location-based solutions can measure the current traffic levels along indicated routes to help businesses

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find alternative ways for their logistics, which would create an opportunity for market growth, supported by the country's priority to become the logistics hub during the forecast period.

- For instance, in August 2023, the government of Saudi Arabia announced the master logistics centers plan to construct 59 centers with a total area exceeding 1 billion square feet, which would include 12 logistics centers for the Riyadh region, 12 for the Makkah region, 17 for the Eastern Province, and 18 across the remaining areas of the kingdom by 2030, which would increase the demand for location-based services market in the transportation and logistic segment of the country.

- The country has been registering significant traction in the development of a logistic hub through partnerships among the global logistic players to support the growth of the country's logistic sector, which would create an opportunity for the market vendors due to the application of location-based services, such as asset tracking and geotagging in the logistics sector.

- For instance, in March 2023, Aramco, the country's integrated energy and chemicals companies, and DHL, the international contract logistics provider, announced their collaboration for a joint venture that aims to be operational in 2025, which would provide reliable integrated logistics services for various industries in the country, fueling the growth of the market in the future.

## KSA Location-based Services Industry Overview

The KSA Location-based Services market has recorded a medium level of competition and consists of many local and multi-national location-based services, software, and hardware market vendors, adopting contract expansions, solution developments, and partnership strategies to increase their market presence in the country.

In October 2022, Esri Saudi Arabia Ltd, a key player in the location-based solution market within the Kingdom of Saudi Arabia, forged a strategic partnership with ROSHN, a prominent Real Estate Development company in Saudi Arabia. This collaboration aims to introduce Geospatial Technology into the country's real estate sector. This partnership not only enhances Esri Saudi Arabia Ltd's market presence but also enables ROSHN to leverage Esri's comprehensive suite of location-based products and solutions. These innovative tools will play a pivotal role in optimizing the planning and development processes for ROSHN's ambitious 200 million square meters real estate project in the country. This partnership exemplifies the ongoing efforts of vendors in the KSA Location-based Services market to expand their influence through strategic alliances and solution developments in a moderately competitive landscape, featuring both local and multinational players.

### Additional Benefits:

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

### Table of Contents:

#### 1 INTRODUCTION

##### 1.1 Study Assumptions and Market Definition

##### 1.2 Scope of the Study

#### 2 RESEARCH METHODOLOGY

#### 3 EXECUTIVE SUMMARY

#### 4 MARKET INSIGHTS

##### 4.1 Market Overview

##### 4.2 Industry Attractiveness - Porter's Five Forces Analysis

##### 4.2.1 Bargaining Power of Buyers

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- 4.2.2 Bargaining Power of Suppliers
- 4.2.3 Threat of New Entrants
- 4.2.4 Threat of Substitutes
- 4.2.5 Intensity of Competitive Rivalry
- 4.3 Industry Value Chain Analysis
- 4.4 Assessment of the Impact of COVID-19 on the Market

## 5 MARKET DYNAMICS

- 5.1 Market Drivers
  - 5.1.1 The development of Smart City Projects in The Country is Driving The Market Growth
  - 5.1.2 The Growing Trend of Digitalisation in the Country Supported by the Adoption of Smart Connected Devices
- 5.2 Market Restraints
  - 5.2.1 The Risk of Data Privacy Breaching Due to the Use of Location Data in the Solutions
  - 5.2.2 The Non-Availability of Good Network Connectivity in the Rural Areas of the Country

## 6 MARKET SEGMENTATION

- 6.1 By Component
  - 6.1.1 Hardware
  - 6.1.2 Software
  - 6.1.3 Services
- 6.2 By Location
  - 6.2.1 Indoor
  - 6.2.2 Outdoor
- 6.3 By Application
  - 6.3.1 Mapping and Navigation
  - 6.3.2 Business Intelligence and Analytics
  - 6.3.3 Location-based Advertising
  - 6.3.4 Social Networking and Entertainment
  - 6.3.5 Other Applications
- 6.4 By End-User
  - 6.4.1 Transportation and Logistics
  - 6.4.2 IT and Telecom
  - 6.4.3 Healthcare
  - 6.4.4 Government
  - 6.4.5 BFSI
  - 6.4.6 Hospitality
  - 6.4.7 Manufacturing
  - 6.4.8 Other End-User Industries

## 7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles
  - 7.1.1 Cisco Systems Inc.
  - 7.1.2 Google LLC
  - 7.1.3 Location Solutions Telematics LLC.
  - 7.1.4 Max GPS Track
  - 7.1.5 HPE Aruba Networking
  - 7.1.6 ALE International

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- 7.1.7 Esri Saudi Arabia Ltd
- 7.1.8 Zebra Technologies Corp
- 7.1.9 Telefonaktiebolaget LM Ericsson
- 7.1.10 IBM Corporation
- 7.2 \*List Not Exhaustive

## 8 INVESTMENT ANALYSIS

## 9 MARKET OPPORTUNITIES AND FUTURE TRENDS

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