

## **GCC Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The GCC Freight and Logistics Market size is estimated at 81.34 billion USD in 2025, and is expected to reach 109.9 billion USD by 2030, growing at a CAGR of 6.21% during the forecast period (2025-2030).

The rising value of the infrastructure sector in GCC led by Saudi Arabia, leading to the overall demand for freight market

- The Saudi Arabian government has allocated SAR 40 billion (USD 10.6 billion) to bolster its road network. In 2023, it kickstarted four highway projects under the Public-Private Partnership (PPP) model. With a vision to position the nation as a major transportation hub, Saudi Arabia has set its sights on investing a substantial USD 147 billion, with a specific focus on advancing the transportation and logistics sector.
- Between 2020 and 2025, the GCC's public and private sectors are projected to require a staggering USD 1.6 trillion in capital for infrastructure development, excluding mega-projects. While the private sector has emerged as a significant contributor, chipping in with resources, the national governments still need to bridge a gap of USD 600 billion to match private sector investments.

Government initiatives and rising oil production are driving the GCC freight market, led by Saudi Arabia

- Qatar's freight and logistics market, valued at USD 2.17 billion in 2022, is projected to reach USD 3.19 billion by 2029. In 2019, Qatar's ports, including Hamad Port, Doha Port, and Ruwais Port, witnessed a surge in cargo handling, with a total of 1,828 ships. This growth bolstered the nation's maritime industry. The transshipment volumes in Qatar's maritime industry climbed in 2022, with its ports handling approximately 116,000 TEUs and over 142,000 tons of general cargo. Qatar Airways witnessed a notable

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uptick, reporting a 25% rise in cargo, equating to 3.3 million tons, and played a crucial role in transporting over 600 million doses of COVID-19 vaccines.

- In 2024, Saudi Arabia actively started working toward cementing its position in the aviation sector, which is in line with its ambitious Vision 2030. This vision aims to attract 120 million annual visitors by 2030 while simultaneously diversifying the economy away from oil dependence. To support this, the government has allocated SAR 113 billion (USD 30.11 billion) for investments in the aviation ecosystem. These investments will focus on upgrading domestic airports, bolstering local airlines, and enhancing supporting infrastructure.

## GCC Freight and Logistics Market Trends

GCC's booming logistics sector, with investments worth billions in infrastructure, fuels economic growth and development

- As of February 2024, the Makkah region in Saudi Arabia has initiated 20 road projects valued at USD 373 million to enhance connectivity and travel within the area. These projects cover 385km of roadways and include a 24km direct route linking Jeddah to Makkah and the doubling of the 90km Allaith-Makkah Road. Expansion of the Bisha-Raniyah-Al-Khurma Road is also planned. The road projects signify a substantial infrastructure investment focused on boosting connectivity and enriching transportation for both residents and visitors.

- The UAE's Dubai Autonomous Transportation Strategy aims to generate an annual revenue of USD 5.99 billion by 2030 through various means such as reducing transportation costs, carbon emissions, and accidents. This includes reclaiming lost commuting hours and boosting individual productivity. The strategy targets a 44% reduction in transportation expenses, equating to savings of USD 245.01 million annually, and a 12% decrease in environmental pollutants, leading to savings of USD 0.40 billion. Led by Dubai's RTA, the Shindagha Corridor project aims to optimize transportation efficiency and generate an annual economic uplift of USD 4.90 billion by 2030.

Approximately 30% of the Middle East's natural gas reserves are held by Qatar

- Saudi Aramco has announced that starting from January 1, 2024, the retail price of diesel will surge by 53% to USD 0.3067 per liter. This marks the third increase since 2016. Also, prices for natural gas and other fuels will also see an uptick in 2024. These price hikes are part of KSA's government-led reforms aimed at restructuring domestic fuel prices. Launched in 2016 amidst a period of low oil prices, these reforms entail gradual adjustments to gasoline, diesel, and electricity prices as the country moves towards phasing out energy subsidies.

- The weighted average cost of gas production across the GCC is expected to increase by one-third to two-thirds between 2015 and 2030, from USD 1.50 to USD 4.50 per thousand cubic feet in 2015 to USD 2.00-USD 7.00 per thousand cubic feet in 2030. Qatar holds 11% of the world's proven natural gas reserves and almost 30% of the Middle East's reserves. With reserves of crude oil estimated at 25.2 billion barrels in January 2023, Qatar held the 6th largest reserves in the Middle East and the 14th largest in the world.

## GCC Freight and Logistics Industry Overview

The GCC Freight and Logistics Market is fragmented, with the major five players in this market being Asyad, Bahri, DHL Group, DP

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World and DSV A/S (De Sammensluttede Vognmænd af Air and Sea) (sorted alphabetically).

Additional Benefits:

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

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