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Agenda Item 2: Fostering aviation growth and air connectivity through investments in infrastructure, human capital and partnerships
2.1: Integrating civil aviation into national development and investment plans

THE EXPERIENCE OF SAUDI ARABIA IN BUILDING UP THE NATIONAL AVIATION STRATEGY (NAS)

(Presented by Saudi Arabia)

EXECUTIVE SUMMARY

This information paper presents the experience of Saudi Arabia in building up the National Aviation Strategy (NAS), and highlight the alignments between civil aviation development with a national economic-diversification. It outlines the Strategy's objectives, pillars and progress to date, and demonstrates how this national approach directly supports the objectives of the Seventh Worldwide Air Transport Conference (ATConf/7), in particular the mobilization of financing for infrastructure, the strengthening of institutional and human capital in line with the International Civil Aviation Organization (ICAO) program *The Next Generation of Aviation Professionals* (NGAP). The government supports implantation of required high level initiatives i.e. airlines capacity, airports infrastructure, enhancing air navigation infrastructure, regulation reforming and industry localization. and the enablement of sustainable and inclusive growth in international air transport.

1. INTRODUCTION

1.1 International air transport is increasingly recognized not merely as a mode of transportation but as a strategic enabler of national economic development, tourism growth, trade, religious, facilitation and social connectivity. Recognizing this, a growing number of the International Civil Aviation Organization (ICAO) Member States have embedded ambitious, whole-of-government civil aviation strategies within their broader national development agendas.

1.2 Saudi Arabia offers a clear example of this approach. Since 2016, the Kingdom has pursued Saudi Vision 2030, a comprehensive programme of economic diversification away from oil dependence. Civil aviation has been identified as one of the central enablers of this Vision, giving rise to the Saudi National Aviation Strategy (NAS), launched under the General Authority of Civil Aviation (GACA).

1.3 This information paper introduces the NAS, compliance with the themes of the Seventh Worldwide Air Transport Conference (ATConf/7), and offers the Kingdom's experience as a reference point for the Conference's deliberations on economic regulatory frameworks, infrastructure financing and sustainable, inclusive growth.

2. BACKGROUND: SAUDI VISION 2030 AND THE ROLE OF AVIATION:

2.1 Saudi Vision 2030 rests on three overarching themes: a vibrant society, a thriving economy, and an ambitious nation. Within the thriving-economy theme, transport and logistics — and civil aviation in particular — are treated as a strategic pillar, owing to Saudi Arabia's geographic position at the intersection between Asia, Europe and Africa, and its role as the destination for the Guest of Allah (Pilgrims) traffic.

2.2 Aviation directly supports several Vision 2030 targets, including growing international tourism to approximately 150 million visits annually, around 30 million Guest of Allah (Pilgrims), developing an integrated national logistics ecosystem, and diversifying government revenue away from oil and gas. GACA accordingly coordinates the aviation component of Vision 2030 together with the all aviation steakholders.

2.3 The NAS was launched to translate these national ambitions into sector-specific targets, investment plans and institutional reforms, including the ongoing transition of GACA from an airport operator to a dedicated economic and safety regulator.

3. OVERVIEW OF THE NATIONAL AVIATION STRATEGY:

3.1 The NAS is organized around three main pillars: (a) supporting the delivery of Vision 2030; (b) enabling the National Tourism Strategy; and (c) encouraging and strengthening the domestic aviation sector. Within these pillars, the Strategy sets out five focus areas: enhancing global connectivity; boosting passenger traffic; expanding air cargo capacity; developing a world-class aviation ecosystem; and creating jobs & supporting the ICAO Next Generation of Aviation Professionals (NGAP) programme.

3.2 **Headline 2030 targets under the Strategy include the following:**

Indicator	Baseline	2023 Target
Annual pax throughput	Approx. 112 million (2023) *141 million (2025)	330 million pax including 30 million Guest of Allah (Pilgrims)
International destinations served	Approx. 100	250+
Air cargo handled annually	-	4.5 million tones
Aviation Sector contribution to GDP	Approx. US$ 21 billion	Approx. US$ 75 billion
Employment Generated (direct/indirect)	-	1.2 million / 2million
Planned public and privet investment	-	Approx. US$ 100 billion

3.3 **Implementation is supported by a high-level initiatives:**

a) Airline capacity: fleet renewal and expansion by the incumbent national carrier (Saudia- SV), together with the establishment of another full-service national carrier based in Riyadh (RIYADH AIR- RX), intended to develop a complementary dual-hub model alongside the Jeddah hub; in addition to a new low-cost Airline based in Dammam (AirArabia Damama-9P), and the continuance enhancement and fleet expansion for the current low-cost Airlines (FlayNas-XY) and (FlayAdel-F3). Introducing tow new unscheduled/charter airlines (Beond/Jazeera) (Appendix A-1);

b) Airport infrastructure: development of a major new multi-terminal, multi-runway international airport in Riyadh King Salman International Airport (KSIA), alongside expansion of existing gateways in Jeddah and Dammam, with an ambition plan to enhance airport privatization pursued to attract private capital and operating expertise (Appendix A-2);

c) Enhancing air navigation infrastructure by adoption of advanced technological solutions and the promotion of innovation. A leading initiative as Saudi future Airspace concept (SFAC), Saudi Network management, Free Route Airspace (FRA), Visual Flight Routes (VFR), Advanced Air Mobility (AAM) and Unmanned Traffic Management (UTM).

d) Regulatory reform: updating civil aviation law, introduction of enhanced passenger-rights protections and updated economic regulation to support a competitive, transparent investment environment;

e) Sustainability: a comprehensive environmental sustainability programme spanning airports, airlines, ground handling and air navigation services, including development of a carbon-neutral airport and evaluation of sustainable aviation fuel pathways; and

f) Industrial localization: development of domestic maintenance, repair and overhaul (MRO) capacity, aerospace manufacturing and workforce training, to increase local content and direct employment in the sector.

4. ALIGNMENT WITH THE OBJECTIVES OF ATCONF/7:

4.1 Saudi Arabia considers that the NAS experience speaks directly to several of the priority areas identified for ATConf/7 under its theme, “Air Transport: Powering Global Connectivity, Economic Development and Resilience in a Dynamic World”:

a) mobilizing financing for infrastructure. The NAS demonstrates a model for blending sovereign investment, public-private partnership (PPP), and airport privatization to fund large-scale aviation infrastructure, offering lessons for Member States seeking to close aviation infrastructure financing gaps to enabling high-quality investments;

b) strengthening institutional and human capacity. The transition of GACA toward a focused regulatory mandate, together with sustained investment in MRO capability and workforce localization, illustrates an approach to institutional and human-capital development that other States may find instructive;

c) enabling sustainable and inclusive growth. The integration of a sector-wide environmental sustainability programme alongside rapid capacity growth illustrates an approach to reconciling expansion with decarbonization commitments;

d) advancing economic regulatory frameworks. Reforms to passenger protection and airport economic regulation reflect an evolving national regulatory framework responsive to liberalization and new market entry; and

e) shaping policy foundations for innovation. Investment in a digitally native national carrier and in new airport technology reflects the adoption of innovation as a deliberate strategic driver rather than an incidental outcome.

5. CONSIDERATIONS FOR MEMBER STATES:

5.1 Based on the Saudi experience, this information paper offers several considerations, which may support other Member States pursuing national aviation development strategies:

a) anchoring civil aviation strategy explicitly within a national economic development plan strengthens the case for sustained political support and long-term investment;

b) separating the regulatory and commercial/operational functions of civil aviation authorities can support a more transparent and competitive investment environment;

c) coupling capacity expansion with an explicit environmental sustainability programme from the outset helps ensure that growth targets and decarbonization commitments are pursued in parallel rather than in tension; and

d) national strategies benefit from clear, measurable, time-bound targets that allow for public tracking of progress and course correction where required.

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APPENDIX

SAUDI ARABIA'S NATIONAL AVIATION SECTOR: AIRLINE FLEET AND AIRPORT INFRASTRUCTURE STATISTICS

Supporting data for the information paper-WP/192 submitted to ATConf/7

This appendix presents consolidated statistics on the current and planned fleets of Saudi Arabia's national air carriers, together with airport passenger-capacity data and national aviation infrastructure expansion targets through 2030, in support of Saudi Arabia's Vision 2030 civil aviation strategy.

1. National Airline Fleets: Current and Planned Fleets of Major Saudi National Carriers.

Airline	IATA code	Current Fleet	Fleet/ Expansion Target	Key Info.
Saudia	**SV**	**149**	**+116 new aircraft**	**Full-service national carrier; major hubs in Riyadh and Jeddah; operates Airbus and Boeing narrow- and wide-body aircraft.**
Riyadh Air	**RX**	**8**	**+158 new aircraft**	**New national carrier based in Riyadh; targeting 100+ destinations by 2030.**
Flaynas	**XY**	**68**	**+160 new aircraft by 2023**	**Leading Saudi LCC; primarily A320neo; extensive Airbus order book and expanding international network.**
Flayadeal	**F3**	**47**	**+100 new aircraft by 2023**	**Saudi low-cost carrier; primarily A320neo, with A330neo aircraft planned for**

				long-haul expansion
Air Arabia Dammam	**-**	**New air carrier**	**45 aircraft by 2030**	**New Saudi LCC based at King Fahd International Airport; targeting 10 million passengers annually.**
Total	**-**	**272 aircraft**	**+600 aircraft by 2030**	**Part of Saudi Arabia's transformation into a major global aviation hub.**

2. Airport Network Capacity and Expansion: Key Saudi Airports: Current Capacity and Expansion Targets.

Airport /network	Current / Reference Capacity	Expansion Target	Key Role
Saudi Arabia – National Network	**141 million pax**	**330 million pax by 2030**	**National aviation network targeting 250+ international destinations**
King Salman International Airport – Riyadh	**New major airport development**	**120 million passengers/year by 2030; 185M by 2050**	**Future global hub for Riyadh and Riyadh Air.**
King Abdulaziz International Airport – Jeddah	**Major international hub**	**80 million passengers/year**	**Key gateway for Guest of Allah (Pilgrims), and major hub for Saudia airline international connectivity.**
King Khalid International Airport – Riyadh	**37M passengers in 2024**	**56 million passengers/year**	**Major existing Riyadh airport supporting the transition toward King Salman International Airport.**
King Fahd International Airport – Dammam	**TBD**	**19.3M passengers/year by 2030; ~32M long term**	**Hub for the new Air Arabia Dammam national carrier.**

Prince Mohhamed bin Abdulaziz international airport	**12.2 million pax 2025**	**27 million 2023**	**Second hub for Guest of Allah (Pilgrims)**
Abha International Airport	**1.8M passengers**	**13 million pax 2030**	**Supports tourism and economic development in the Asir region.**
National Airport Network	**29 airports within the national strategy framework**	**Expansion and modernization Taif ,Jazan, aljouf. Ect.**	**Supporting tourism, business travel, domestic connectivity and international aviation.**

3. Sources:

- General Authority of Civil Aviation (GACA), Saudi Arabia — gaca.gov.sa
- Saudi Ministry of Transport and Logistics Services — National Aviation Strategy statements (2022)
- General Authority for Statistics (GASTAT), Air Transport Statistics Bulletin 2025
- Public Investment Fund (PIF) — King Salman International Airport master plan, pif.gov.sa
- Saudia Group corporate communications and Aviation Week (2026 fleet expansion announcements)
- Riyadh Air — riyadhair.com; Arab News fleet and network coverage (2026)
- Flaynas official website.
- SANS official website.

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