

Industrial Safety & Security

Security Workshop

Business Opportunities

13th January 2025

Catalyzing Supply Chains

This presentation may contain certain forward-looking statements. All statements other than statements relating to historical facts are, or may be deemed to be, forward-looking statements. Forward-looking statements include, but are not limited to, statements related to future events or to the company's future financial or operating performance such as the company's expectations and projections regarding its growth, initiatives and strategies, capital expenditures and investments, customer and partner relationships, major projects and product development. These statements may generally, but not always, be identified by the use of words such as "target," "goal," "aim," "believe," "expect," "commit," "anticipate," "intend," "estimate," "should," "will," "shall," "may," "likely," "plan," "strategy," "initiative," "project," "outlook" or similar expressions, including variations and the negatives thereof.

Forward-looking statements reflect the company's expectations, beliefs, estimates, forecasts, projections and assumptions, only as of the date such statements are made, and are subject to known and unknown risks, uncertainties and other important factors beyond the company's control that could cause the company's actual results, performance or achievements to be materially different from the expected results, performance, or achievements expressed or implied by such statements. Factors that could cause actual results to differ materially from the company's expectations include, among other things, the following: global supply, demand and price fluctuations of oil, gas and petrochemicals; global economic conditions; competition in the industries in which the company operates; climate change concerns, weather conditions and related impacts on the global demand for hydrocarbons and hydrocarbon-based products; risks related to the company's ability to successfully meet its ESG targets, including its failure to fully meet its GHG emissions reduction targets by 2050; conditions affecting the transportation of products; operational risk and hazards common in the oil and gas, refining and petrochemicals industries; the cyclical nature of the oil and gas, refining and petrochemicals industries; political and social instability and unrest and actual or potential armed conflicts in the MENA region and other areas; natural disasters and public health pandemics or epidemics; the management of the company's growth; the management of the company's subsidiaries, joint operations, joint ventures, associates and entities in which it holds a minority interest; exposure to inflation, interest rate risk and foreign exchange risk; risks related to operating in a regulated industry and changes to oil, gas, environmental or other regulations that impact the industries in which the company operates; legal proceedings, international trade matters, and other disputes or agreements; and other risks and uncertainties that could cause actual results to differ from the forward-looking statements in this presentation, as set forth in the latest periodic reports filed by the Saudi Arabian Oil Company ("Aramco") with the Saudi Exchange. For additional information on the potential risks and uncertainties that could cause actual results to differ from those presented please see Aramco's most recent annual periodic report filed with the Saudi Exchange and any subsequent filings thereto.

We undertake no obligation to update or revise any forward-looking statement, whether as a result of new information, future events or otherwise. All subsequent written and oral forward-looking statements attributable to us or to persons acting on our behalf are expressly qualified in their entirety by this cautionary statement.

Catalyzing Supply Chains

iktva Program Overview (1/2)

The In-Kingdom Total Value Add (iktva) program is designed to drive increased investment, economic diversification, job creation, and workforce development within the Kingdom

Saudi Aramco aims to achieve 70% localization of all spending



iktva in Procurement

2000+ Service contracts	290+ Corporate purchase agreements
-----------------------------------	--



Business Opportunities

14 Sectors	+200 Business Opportunities	\$28 bn Annual Market Size
----------------------	---------------------------------------	--------------------------------------



Anchor Projects

6 Anchor projects

 IMI	 SPARK	 Tuwaiq
--	--	---

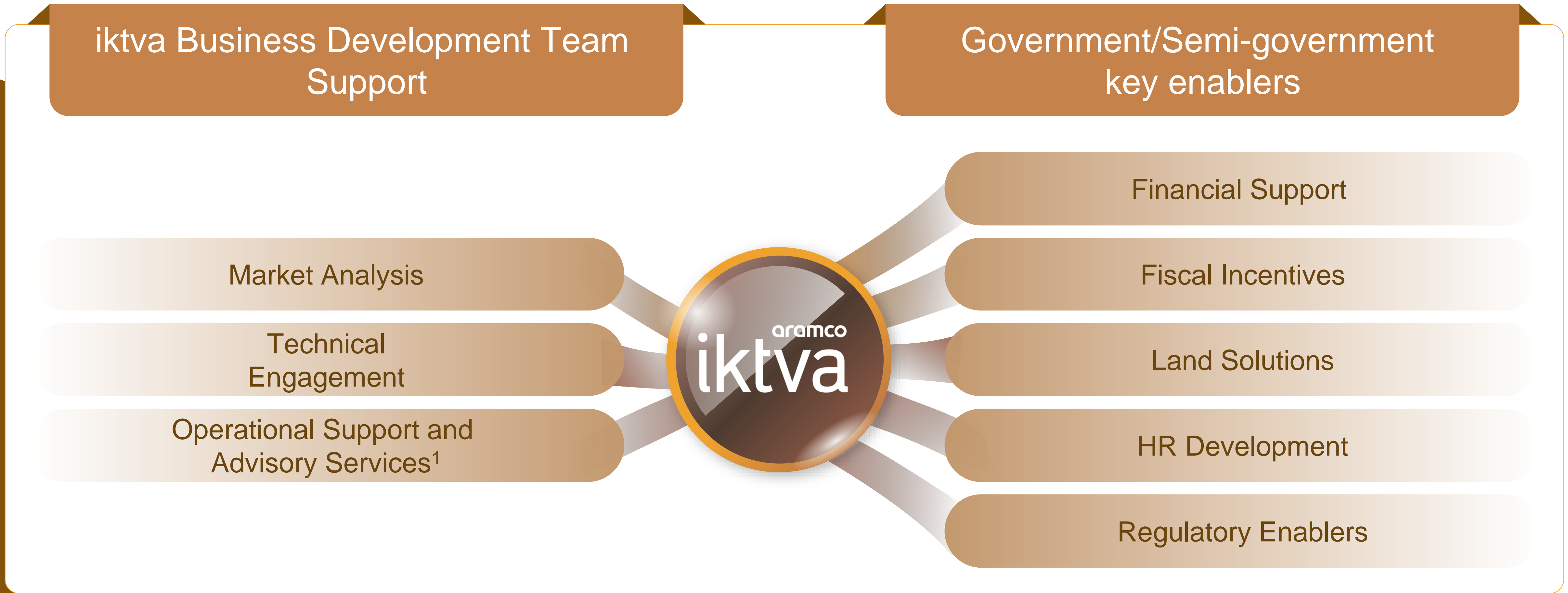


Local Workforce Development

16 National training centers	90+ Programs
--	------------------------

Catalyzing Supply Chains

Security Workshop

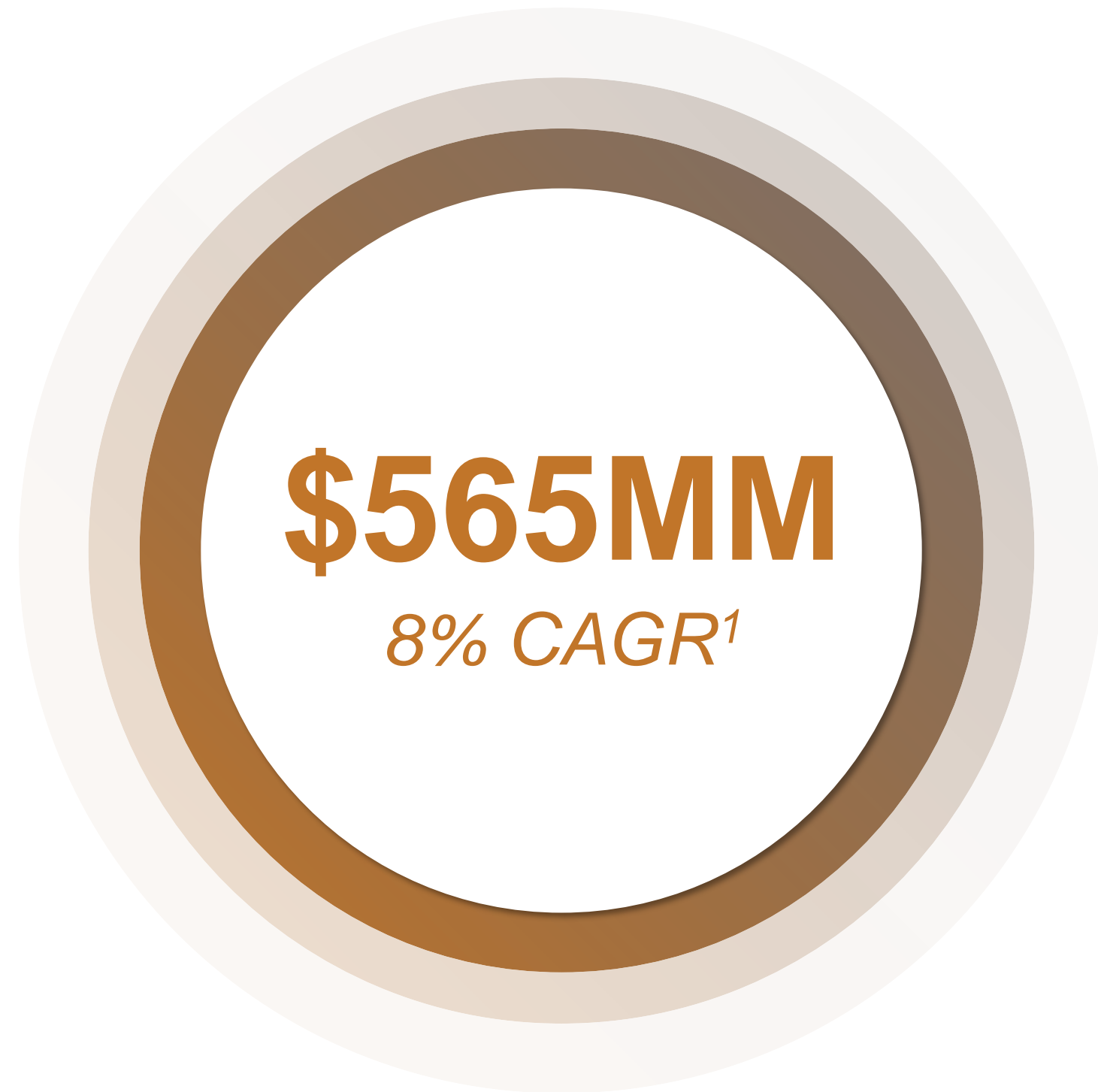


Catalyzing Supply Chains

¹ Includes broad range of support services provided by the team: user requirements, advisory on available financial and fiscal incentives, guidance on localization process in line with local regulations and standards, action plan development etc.

Security Market Overview

KSA Industrial Security Market



2025 KSA market size for opportunities
in today's workshop

Five opportunities to be discussed today

- 1 Rigid Welded Mesh Fence
- 2 Deployable Crash Barrier
- 3 Physical Access Control Systems (ACS)
- 4 K9/Essentials
- 5 Revolving Lights
- 6 Security Badges

Catalyzing Supply Chains

Workshop Agenda

No.	Title of the Investment Opportunity	Presenter
-	Introduction	Mohammed Alotaibi
1	Rigid Welded Mesh Fence	Mohammed Aljawi
2	Deployable Crash Barrier	Mohammed Aljawi
4	Physical Access Control Systems (ACS)	Mohammed Aljawi
3	K9 Accessories	Abdulrhman Senan
5	Revolving Lights	Ibrahim Aldhafeeri
6	Security Badges	Ibrahim Aldhafeeri
-	Closing remarks	Ibrahim Aldhafeeri

Catalyzing Supply Chains

Rigid Welded Mesh Fence

Mohammed Aljawi

Opportunity profile – Rigid Welded Mesh Fence

1

KSA's infrastructure and industrial projects drive fencing demand

2

Rigid welded mesh fence market is moderate in scale with steady growth

3

Attractive investment opportunities for the value chain

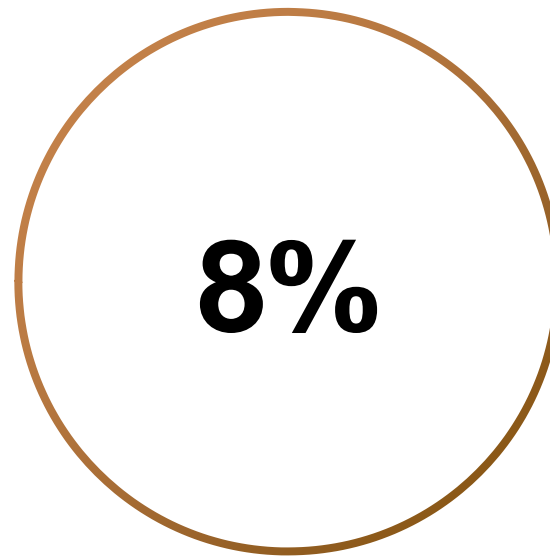
Product



Rigid Welded Mesh Fence



Estimated 2024 KSA market size (\$MM)



Forecasted KSA 5-year CAGR¹

KSA value chain opportunities



KSA enablers

- Financial setup loans
- Corporate tax reduction
- KACST technical support

Catalyzing Supply Chains

1. CAGR is calculated as $((\text{Ending Value} \div \text{Beginning Value})^{(1 \div \text{Number of Years})}) - 1$

Note: MFE = Manufacturing, Opps = Opportunities

Source: Aramco; Team analysis

RWM fences are installed in highly sensitive facilities (not limited to oil and gas industries)

RWM fence

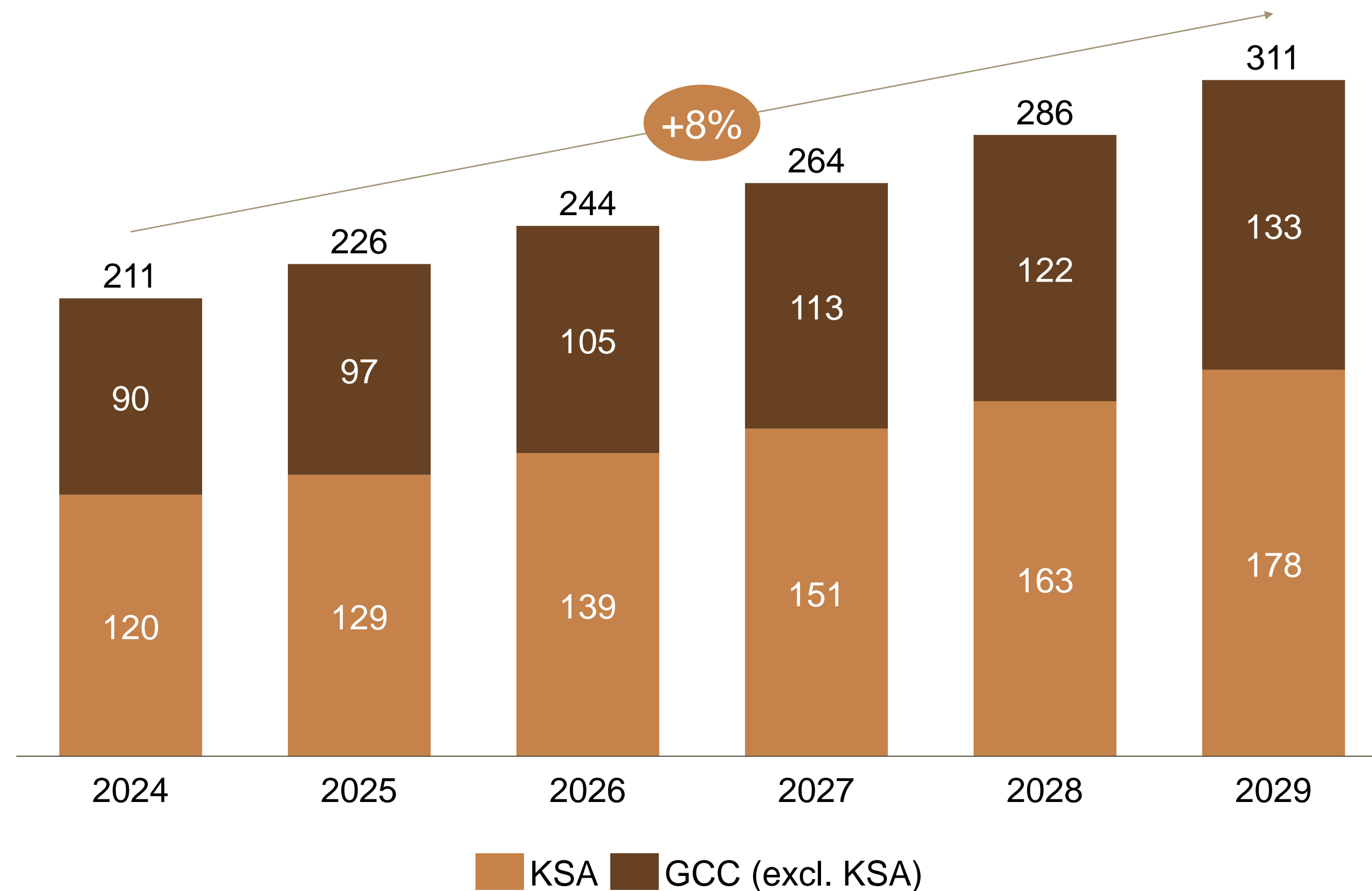


Product Details





- Aggressive Forced Entry Delay: 10 minutes minimum
- Panel Height/Width: 3 meters/3-3.5 meters
- Visibility Index: <45 degrees
- Components Property: Tamper-proof
- Toppings: Varies
- Other requirements apply

Rigid Welded Mesh Fence demand, customers, and drivers

Forecasted KSA and rest of GCC Rigid Welded Mesh Fence market 2024-2029, (\$MM)



Typical customers in KSA

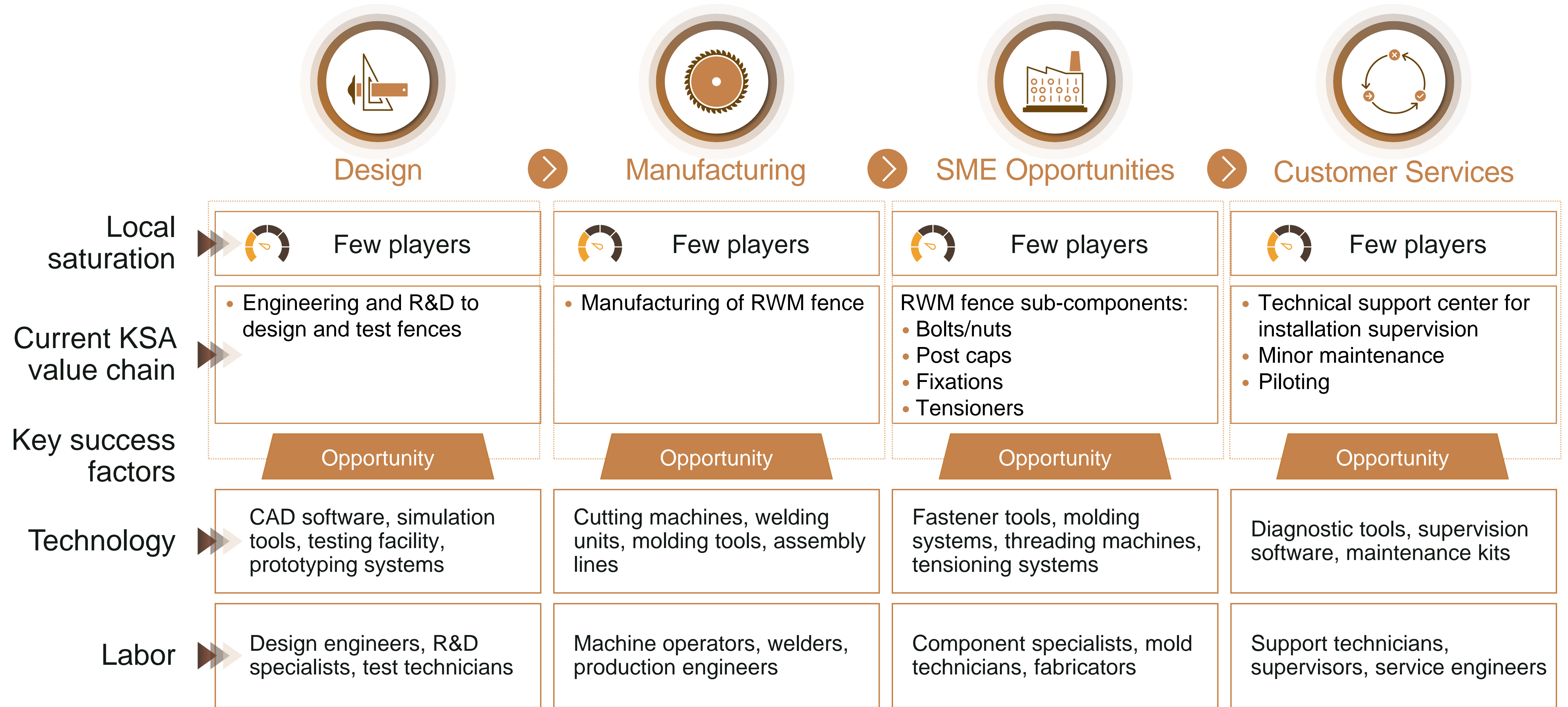
-  Oil & gas facilities
-  Government and defense
-  Industrial facilities
-  Commercial and residential sites

Key KSA demand drivers

- Ongoing expansion of infrastructure projects fueling demand for high-quality RWM fences as a preferred perimeter barrier

Catalyzing Supply Chains

Value chain and key localization opportunities



Catalyzing Supply Chains

Deployable Crash Barrier

Mohammed Aljawi

Opportunity profile – Deployable Crash Barrier

1

KSA in need of crash barriers to meet industrial projects demand

Product



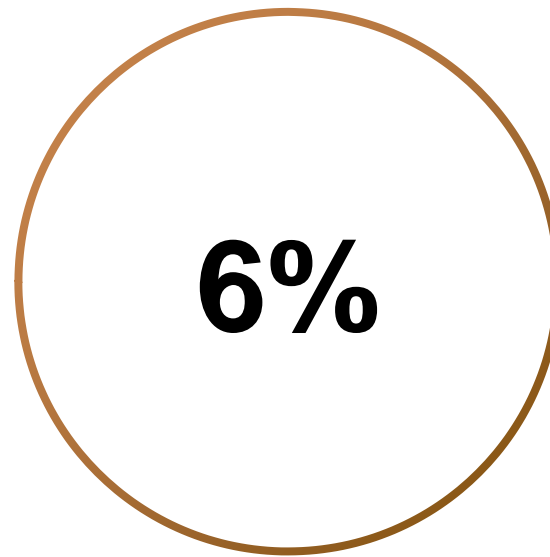
Deployable Crash Barrier

2

Deployable crash barrier market is moderate in scale with steady growth



Estimated 2024 KSA market size (\$MM)



Forecasted KSA 5-year CAGR

3

Attractive investment opportunities for the value chain

KSA value chain opportunities

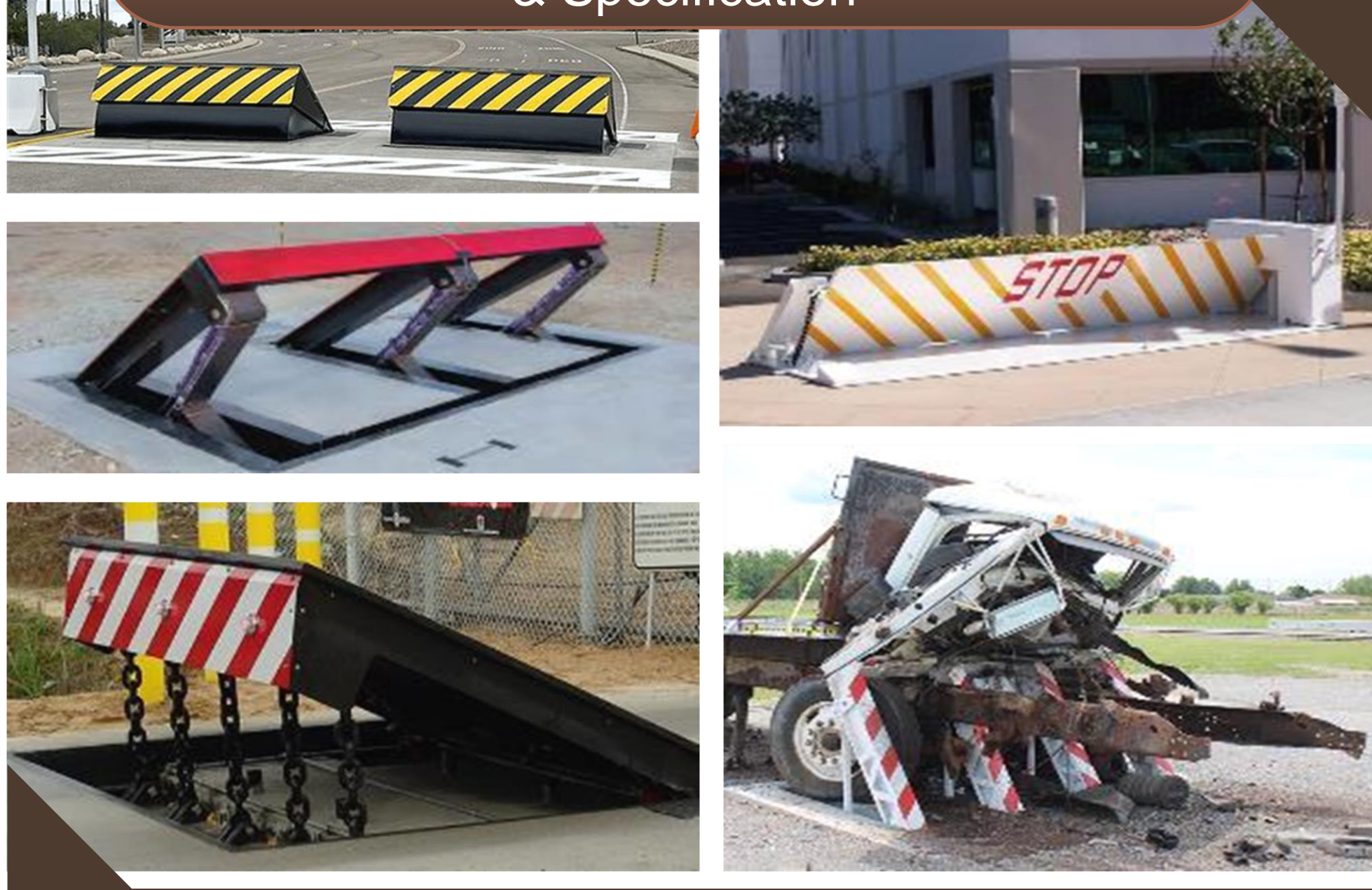


KSA enablers

- Financial setup loans
- Corporate tax reduction
- KACST technical support

Deployable barriers are installed in high sensitive facilities in general

Key Deployable Barrier Typical Technical info & Specification

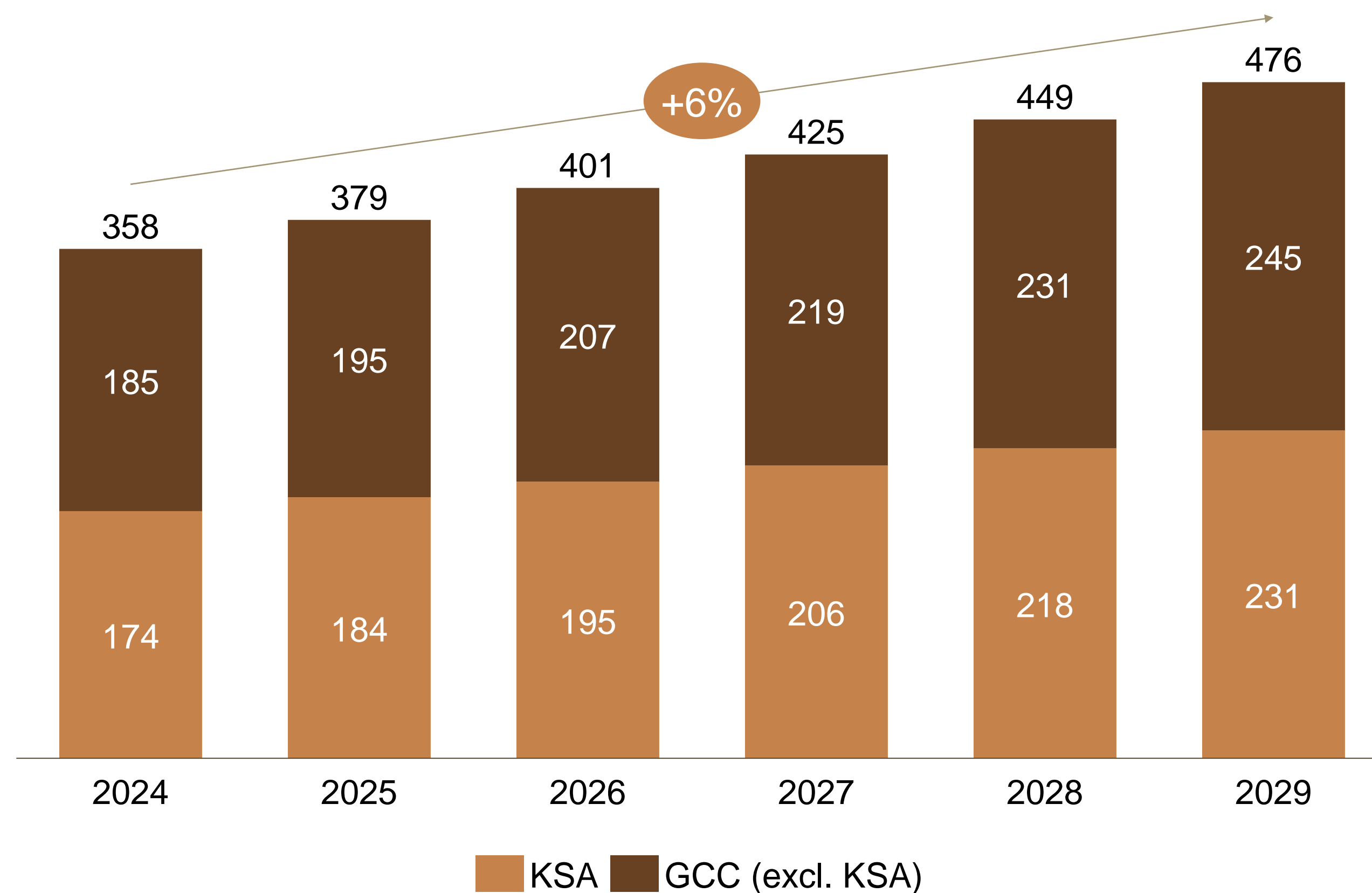


Product Details





- **Performance & Certification:** Rated to M50-P1
- **Operation/Durability:** Operates under excessive heat
- **Safety:** Sensors/indicators & emergency deployment
- **Integration:** Integrates with other security devices at gates
- **Minimum Height:** 90CM or above
- Other requirements apply

Deployable Crash Barrier demand, customers, and drivers

Forecasted KSA and rest of GCC Deployable Crash Barrier market 2024-2029, (\$MM)



Typical customers in KSA

-  Government and defense
-  Airports
-  Commercial facilities
-  Oil & gas facilities

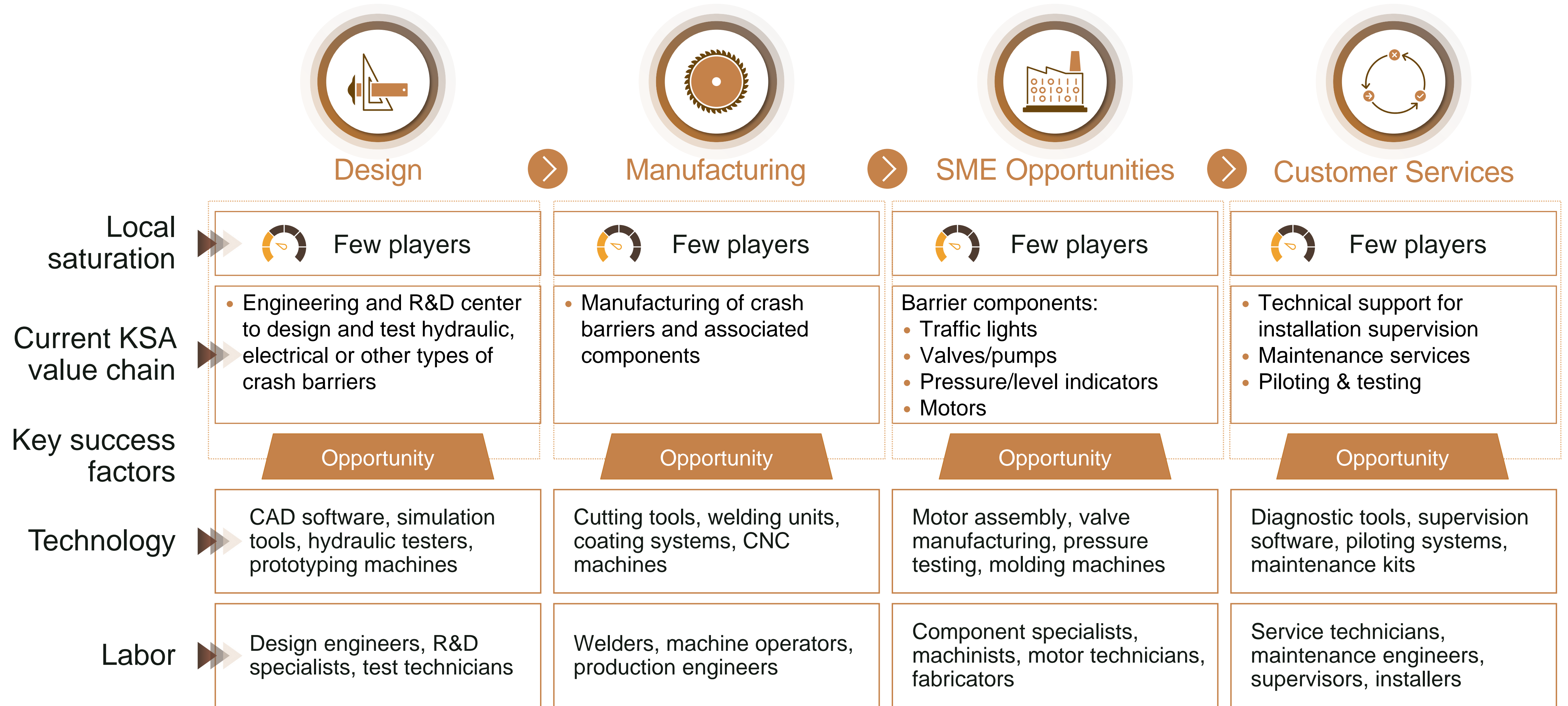
Key KSA demand drivers

- Sustained demand for secure vehicle access control at critical infrastructure and gated communities
- Ongoing infrastructure and security-focused developments expanding the need for proven deployable crash barrier solutions

Catalyzing Supply Chains

Security Workshop

Value chain and key localization opportunities



Catalyzing Supply Chains

Physical Access Control Systems (ACS)

Mohammed Aljawi

Opportunity profile – Physical Access Control Systems (ACS)

1

ACS demand in KSA is driven by government security mandates

2

ACS market is moderate in scale with steady growth

3

Attractive investment opportunities for the value chain

Product



Access Control Systems

\$156MM

Estimated 2024 KSA market size (\$MM)

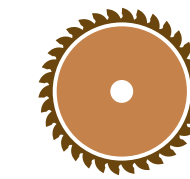
10%

Forecasted KSA 5-year CAGR

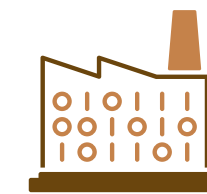
KSA value chain opportunities



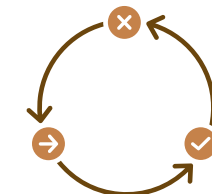
Design



MFE



SME opps



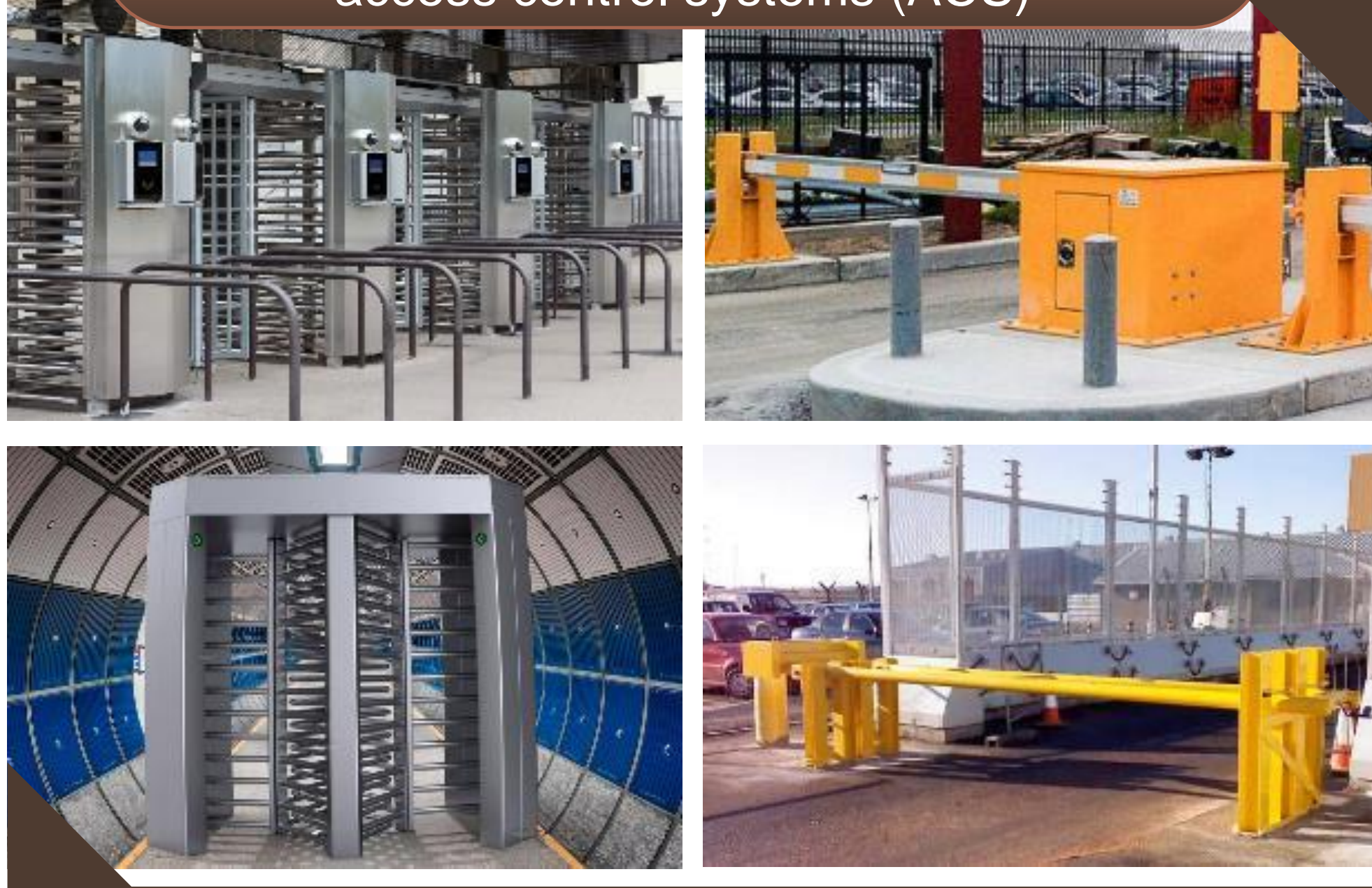
Customer Services

KSA enablers

- Financial setup loans
- Corporate tax reduction
- KACST technical support

Drop arms (Along with the associated systems) are installed in most secured facilities

Typical technical specification for physical access control systems (ACS)

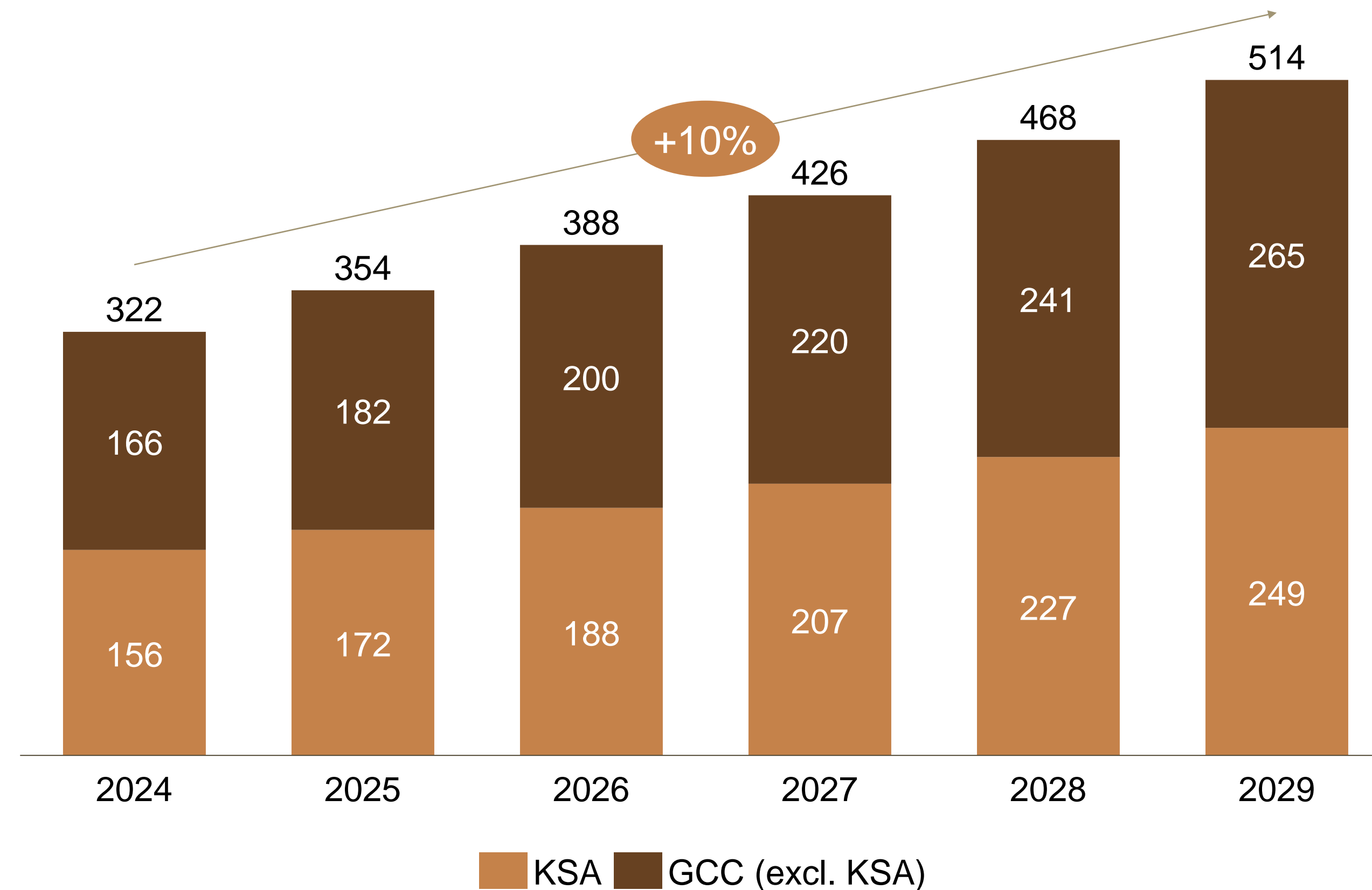


Product Details





- **Certification:** Tested against ingress protection ratings
- **Operation:** Operates automatically/manually
- **Safety:** Equipped with indicators and sensors
- **Integration:** Integrates with other security devices at gates
- **Other requirements apply**

Physical Access Control Systems (ACS) demand, customers, and drivers

Forecasted KSA and rest of GCC Physical Access Control Systems (ACS) market 2024-2029, (\$MM)



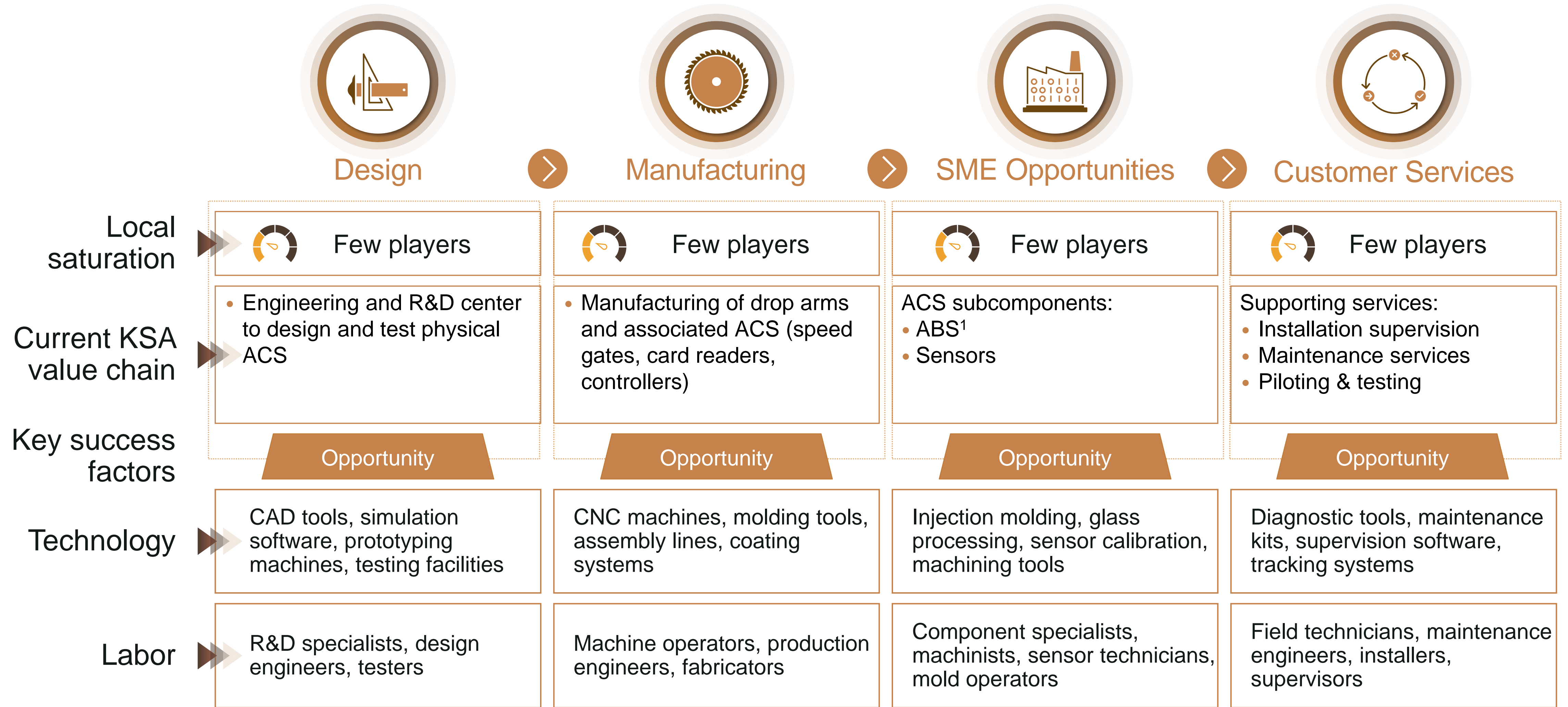
Typical customers in KSA

-  Government and defense
-  Airports
-  Commercial facilities
-  Oil & gas facilities

Key KSA demand drivers

- Government mandates (HCIS) for enhanced security of industrial infrastructure, driving demand for reliable drop arms and other robust physical access solutions

Value chain and key localization opportunities



Catalyzing Supply Chains

1. ABS is used for protective housings, card reader shells, keypad enclosures, lock bodies

Note: CAD = Computer-aided design; CNC = Computer Numerical Control, ACS = Access Control Systems, ABS = Acrylonitrile Butadiene Styrene

Source: Aramco; Team analysis

K9 Accessories

Abdulrahman Senan

Opportunity profile – K9 accessories

1

Accessories market is driven by demand from K9's and domestic dogs

Product



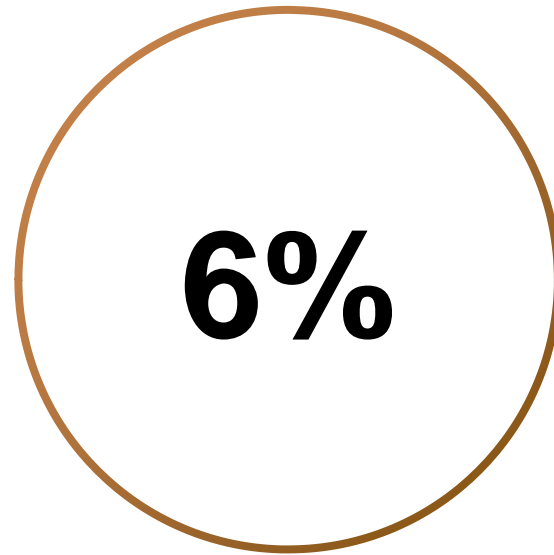
K9 accessories

2

K9 accessories market is niche in size with steady growth



Estimated 2024 KSA market size (\$MM)



Forecasted KSA 5-year CAGR

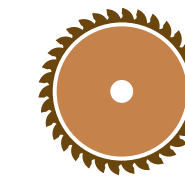
3

Attractive investment opportunities for the value chain

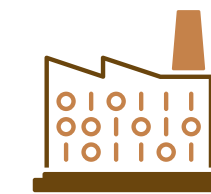
KSA value chain opportunities



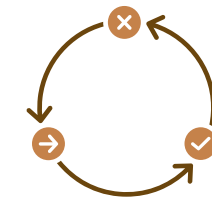
Design



MFE



SME opps



Customer Services

KSA enablers

- Financial setup loans
- Corporate tax reduction
- KACST technical support

Accessories are utilized for the training, development, and security of K9's and domestic dogs

K9 accessories

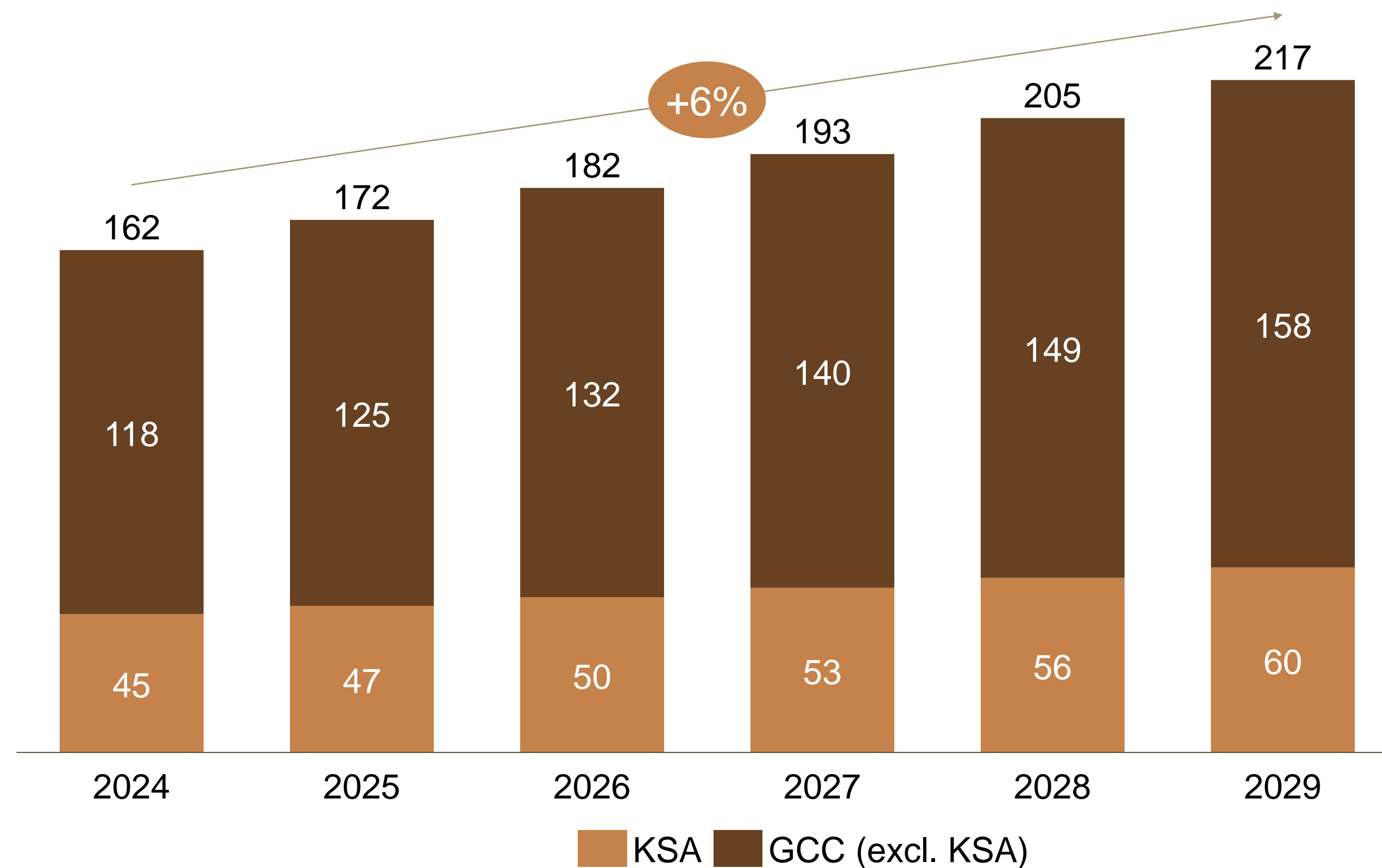


Product Details

- A comprehensive range of durable K9 accessories
- Products include:
 - ✓ Combs (grooming)
 - ✓ Leashes
 - ✓ Harness & Collar
 - ✓ Beds & Crates
 - ✓ Leg bag & equipment bag
- International standards apply

K9 accessories demand, customers, and drivers

Forecasted KSA and rest of GCC dog accessories market 2024-2029, (\$MM)



Typical customers in KSA

- Security and law enforcement agencies
- Professional dog handlers and trainers
- Pet owners

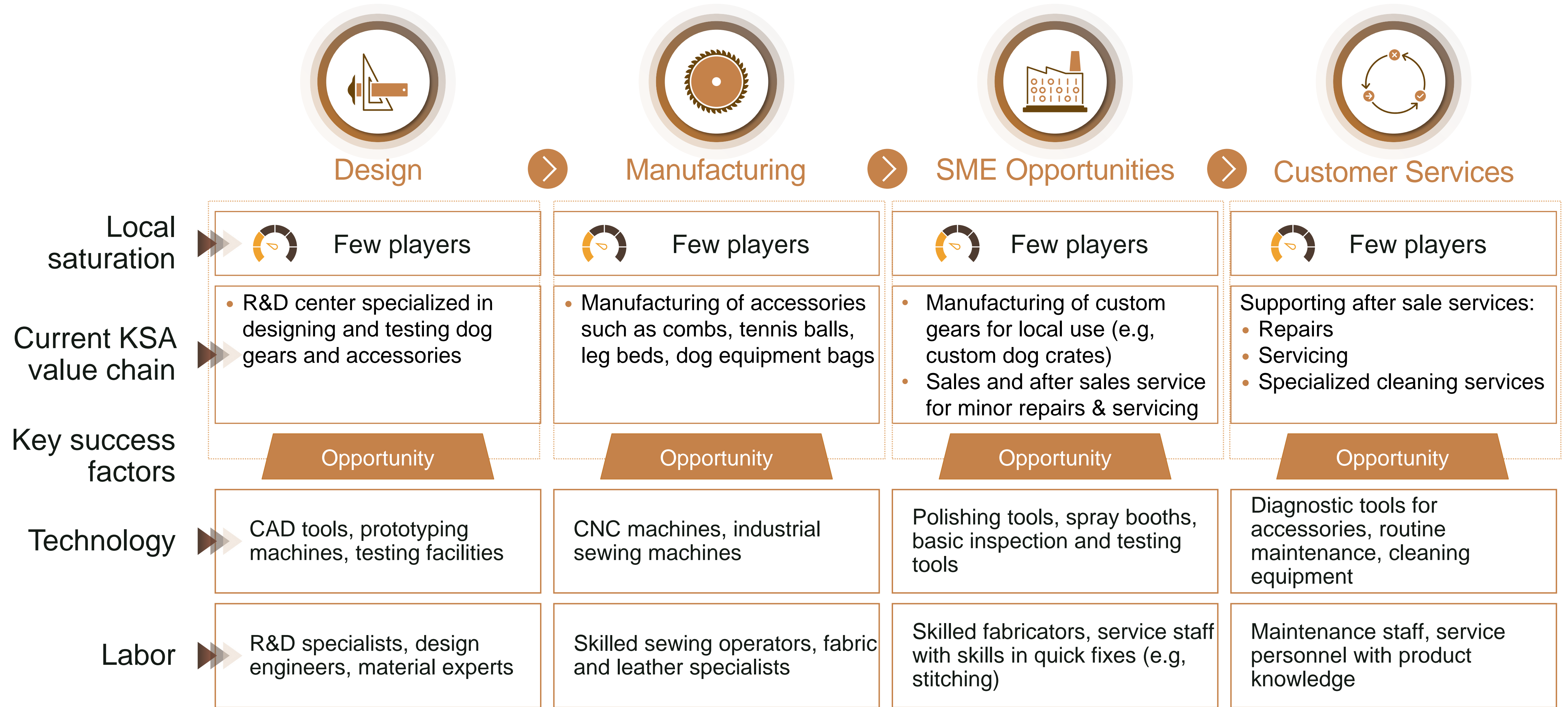
Key KSA demand drivers

- Heightened security concerns and large-scale projects driving demand for security and K9 units increasing demand for accessories
- Increasing trend for domestication of dogs leading to growing demand for dog accessories

Catalyzing Supply Chains

2026 Saudi Aramco Company Confidential. Note: Market size figure presented for dog accessories market K-9 accessories can also be used by regular pet dogs. Source: Aramco; Team analysis

Value chain and key localization opportunities



Security Workshop

Catalyzing Supply Chains

Revolving Lights

Ibrahim Aldhafeeri

Opportunity profile – Revolving Lights

1

Revolving lights demand is driven by ongoing industrial expansion

Product



Revolving lights

2

Revolving Lights market is niche with steady forecasted growth

\$2.9MM

Estimated 2024 KSA market size (\$MM)

6%

Forecasted KSA 5-year CAGR

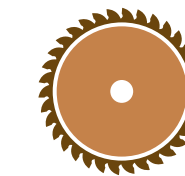
3

Attractive investment opportunities for the value chain

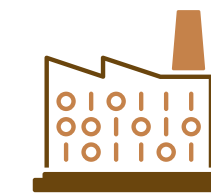
KSA value chain opportunities



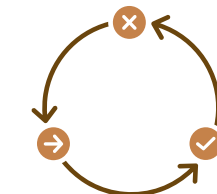
Design



MFE



SME opps



Customer Services

KSA enablers

- Financial setup loans
- Corporate tax reduction
- KACST technical support

Revolving Lights serve multiple sectors within the region

Revolving lights

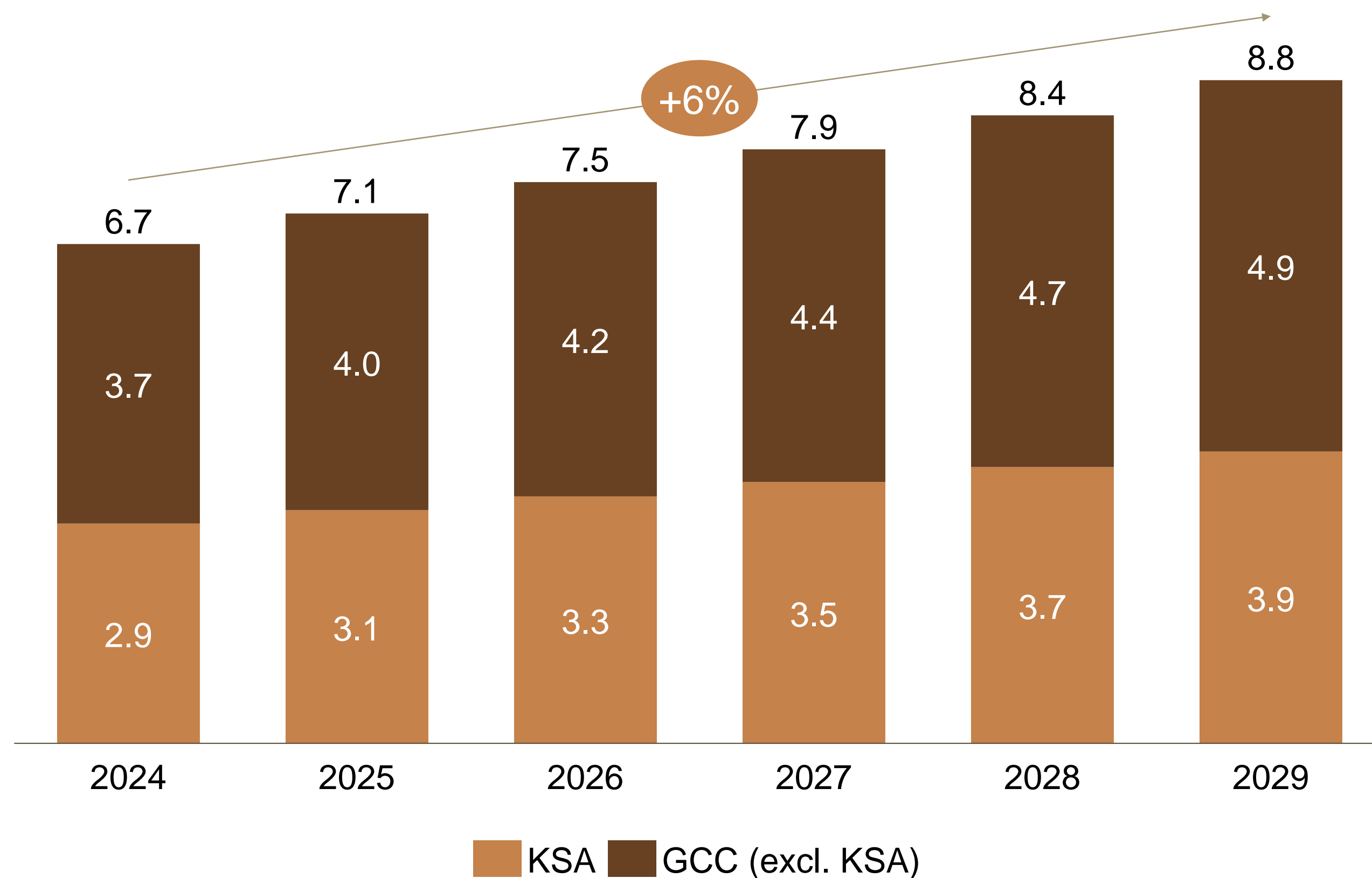


Product Details


- Used for security, safety or law enforcement vehicles
- International standards apply
- Programmable and customizable configuration with PC software
- The voltage is 12 – 14 volts
- The ability to work in extreme environments

Revolving Lights demand, customers, and drivers

Forecasted KSA and rest of GCC Revolving Lights market 2024-2029, (\$MM)



Typical customers in KSA

-  Law enforcement
-  Industrial security
-  Construction vehicles
-  Long vehicles (Logistics)
-  Private security firms

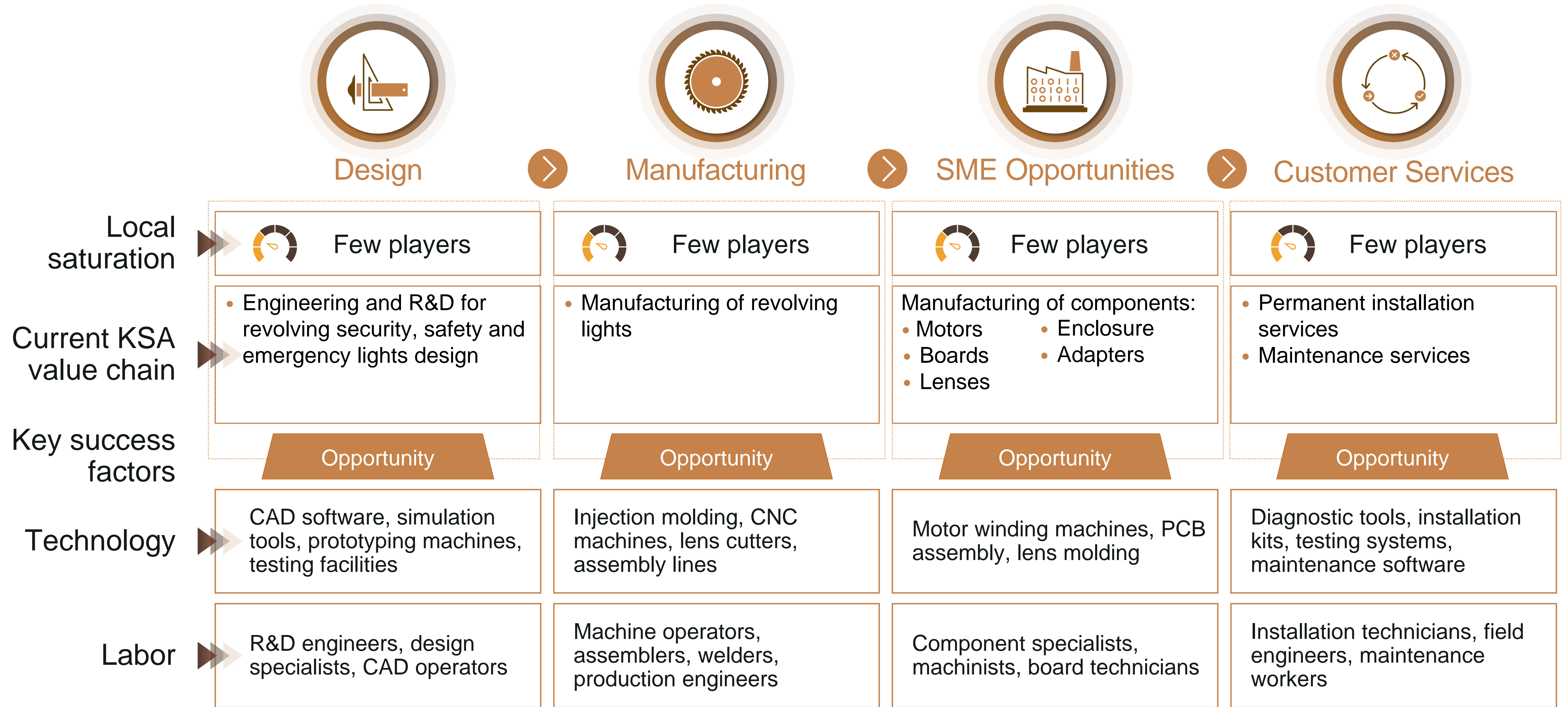
Key KSA demand drivers

- Ongoing expansion of infrastructure, industrial operations, and logistics fleets increasing the need for reliable safety signaling solutions

Catalyzing Supply Chains

Security Workshop

Value chain and key localization opportunities



Catalyzing Supply Chains

Security Badges

Ibrahim Aldhafeeri

Opportunity profile – Security Badges

1

Security badges demand in KSA is driven by growing security concerns

Product



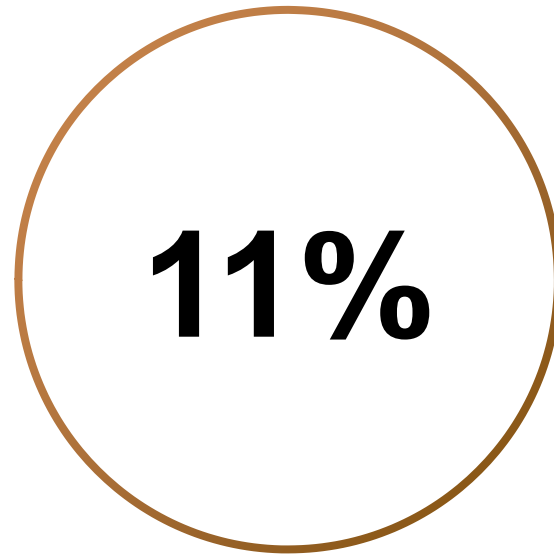
Security badges

2

Security Badges market is niche in size with steady growth



Estimated 2024 KSA market size (\$MM)

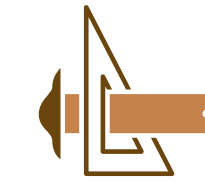


Forecasted KSA 5-year CAGR

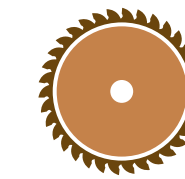
3

Attractive investment opportunities for the value chain

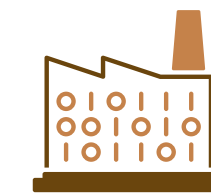
KSA value chain opportunities



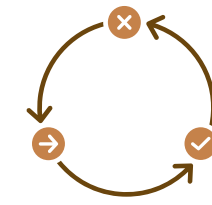
Design



MFE



SME opps



Customer Services

KSA enablers

- Financial setup loans
- Corporate tax reduction
- KACST technical support

Badges are demanded for a variety of functions

Security badges

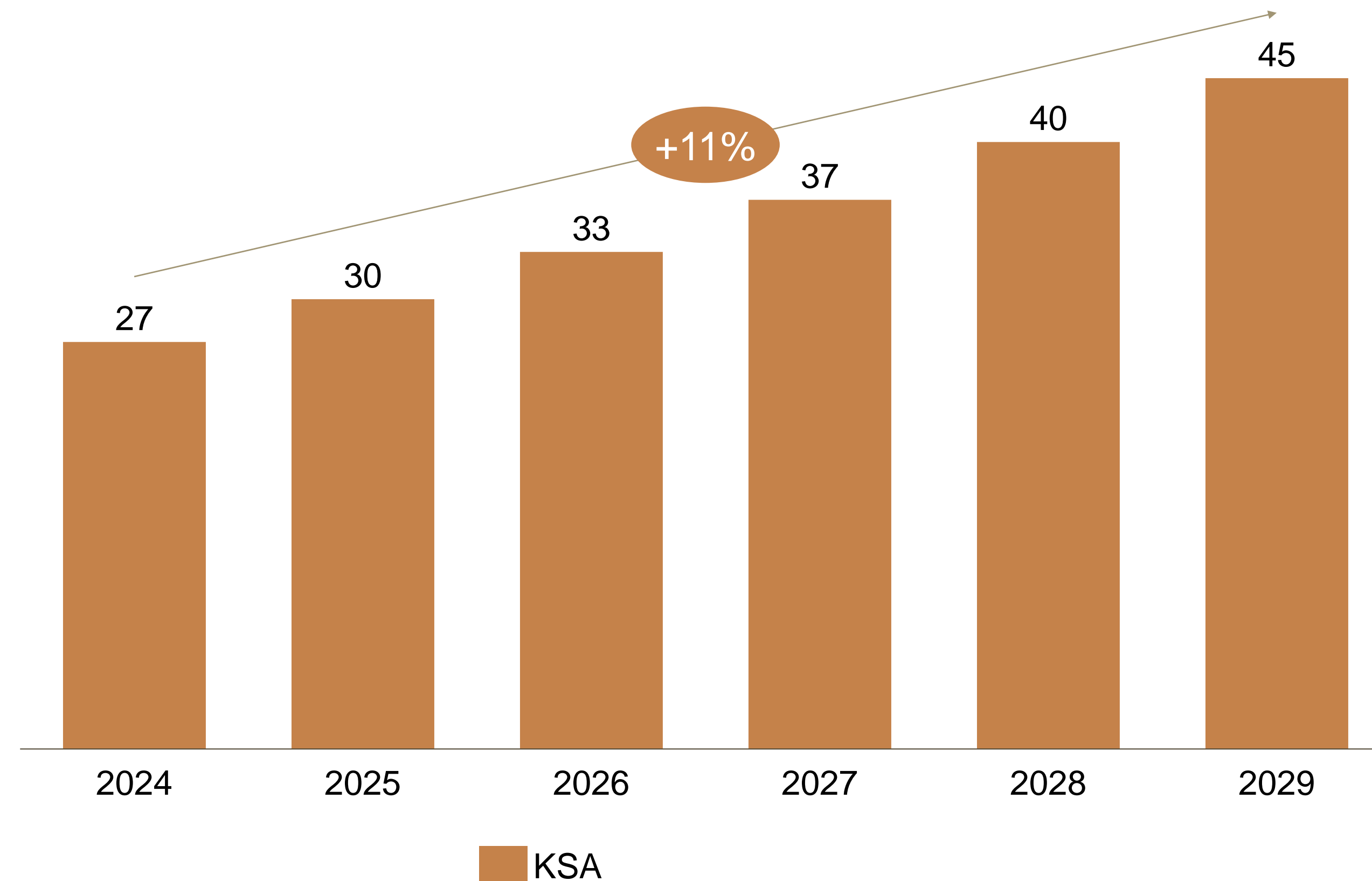


Product Details




- Security badges enable access control, identification, tracking, and authentication for personnel in secure areas and systems
- **Material:** Metal
- **Type:** Chest and Cap
- **Color:** Gold and Silver

Security Badges demand, customers, and drivers

Forecasted KSA Security Badges market 2024-2029, (\$MM)



Typical customers in KSA

-  Law enforcement
-  Industrial security
-  Private security firms

Key KSA demand drivers

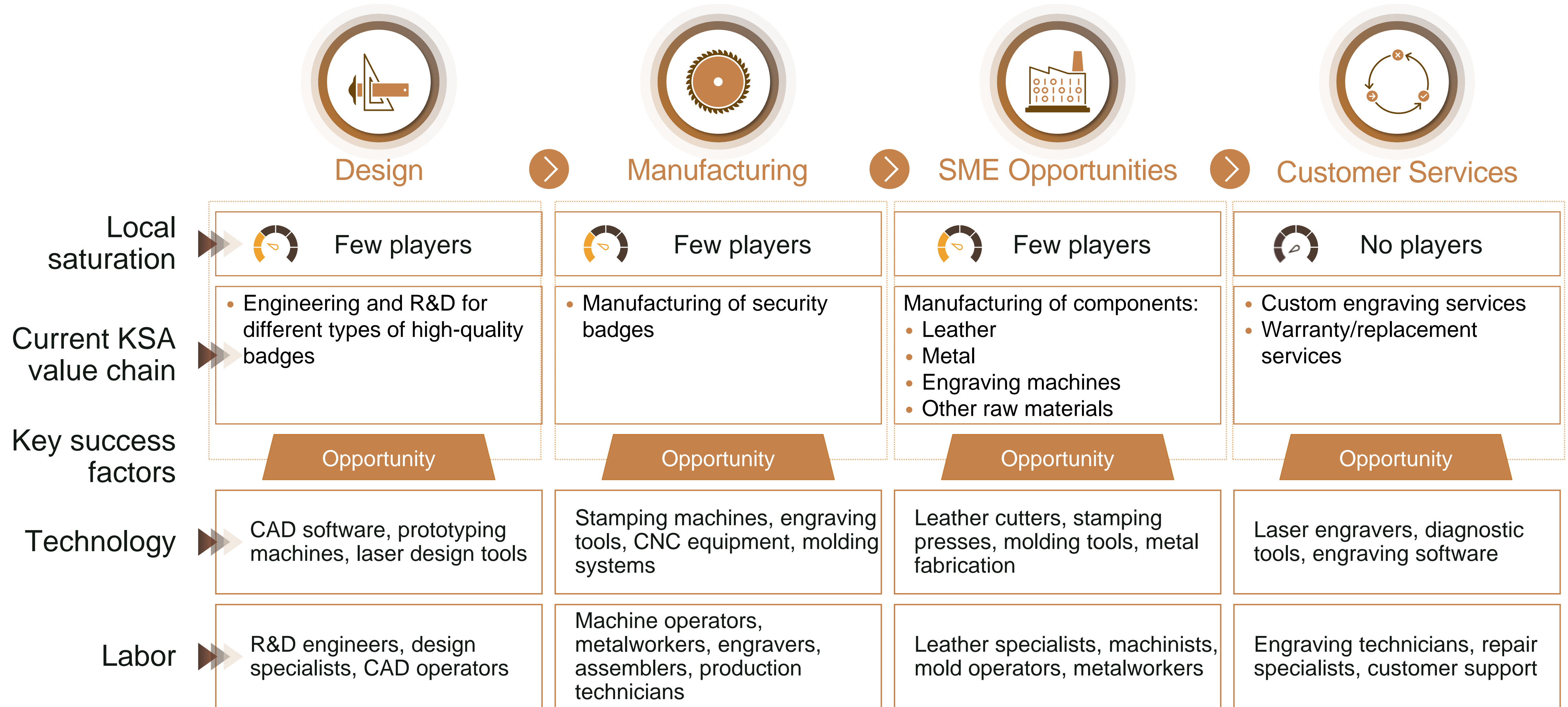
- Growing government and enterprise focus on tighter access control and advanced ID verification due to evolving security threats while having lack of local manufacturers

Security Workshop

Catalyzing Supply Chains

2026 Saudi Aramco Company General Use
Note: Market size figured presented only for KSA due to niche size of the market
Source: Aramco; Team analysis

Value chain and key localization opportunities



Security Workshop

Catalyzing Supply Chains

Note: CAD = Computer-aided design; CNC = Computer Numerical Control, PCB = Printed Circuit Boards

2026 Saudi Aramco | Company General Use
Source: Aramco; Team analysis

**Thank
You**