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Nonmetallic

Renewables & Automotive Workshop

Business Opportunities

Driving Prosperity

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Workshop Agenda

No.	Title of the Investment Opportunity
-	Introduction
1	Carbon Fiber Wind Blades
2	Fuel cells
3	Fuel cells subcomponents
4	Composite Battery Enclosure
5	Tires
-	Closing remarks

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% local content

iktva in Procurement

2000+	290+
Service contracts	Corporate purchase agreements

Business Opportunities

12	200+	$28 bn
Sectors	Business Opportunities	Annual Market Size

Anchor Projects

6 Anchor projects

IMI	SPARK	Tuwaiq

Local Workforce Development

16	90+
National training centers	Programs

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Note: IMI = International Maritime Industries; SPARK = King Salman Energy Park

iktva Program Overview (2/2)

Non-exhaustive

iktva Business Development Team Support

- Market Analysis
- Technical Engagement
- Operational Support and Advisory Services[1]

Government/Semi-government key enablers

- Financial Support
- Fiscal Incentives
- Land Solutions
- HR Development
- Regulatory Enablers

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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.

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Why invest in KSA?

Non-exhaustive

Strong GDP growth and healthy economy	Big market and game-changing opportunities	Government incentives and enablers	Ease of doing business	Strategic global location	Favorable demographics
Top 20 economies globally	**5** Special Economic Zones drive innovation	**$1.3T+** invested in private sector by 2030	one of world's most rewarding tax systems	**12-15%** of global trade passes via Red Sea	**17%** population growth from 2013-2023
GDP growth among highest projected in 2025 in top economies	**6** giga projects driving urbanization and industry	**5.7%** contribution of FDI to GDP by 2030	**Top 5** in the MENA region for ease of doing business	KSA container ports are among the most efficient globally	**67%** of population below the age of 35

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Note: FDI = Foreign Direct Investment
Source: IMF; MISA; Vision 2030 Key Performance Indicators; Shareek Program; World Bank

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Non-exhaustive

3 Industrial Zones and Economic Cities

Industrial zones like KAEC provide specialized infrastructure and logistical services essential for packaging products and services

2 Tax incentives and exemptions

Tax exemptions for earnings from exports and up to 50% tax credit on Saudi nationals' payroll and training costs for 10 years

4 Customs and import duty reductions

MoCI offers zero import duties for localization of selected raw materials, machinery, & equipment

1 Subsidies and financial programs

Loans financing up to 75% of the industrial project provided by SIDF to foster industrial development

5 Visa and legal support

Streamlined visas for investors and skilled workers, with legal support via MISA for fast business setup and compliance

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Note: SIDF - Saudi Industrial Development Fund; MoCI = Ministry of Commerce and Industry; MISA = Ministry of Investment Saudi Arabia
Source: SIDF; ZATCA; KAEC; MoCI; MISA

How do we define what is an opportunity?

1

Growing market

High growth high spend markets

2

Limited local players & import driven

Markets with few local contributors and high import resilience

3

Technological & labor feasibility

Markets with accessible or standardized technology and available skilled labor

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Nonmetallic

Renewables workshop

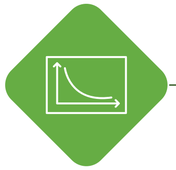
Business Opportunities Review

Key demand drivers for the KSA nonmetallic renewables market

Clean energy initiatives are driving the demand for wind blades and fuel cells, as KSA aims to source at least 50% of its power from renewable energy by 2030 and as KSA invests heavily in green hydrogen projects

Technological advancements in carbon fiber wind blade manufacturing, such as automation and 3D printing, and in fuel cell development, make both more economically viable and adoptable low carbon energy solutions

Environmental regulations such as the Saudi Green Initiative and the adoption of the Circular Carbon Economy concept support the ambition to reach net zero emissions by 2060

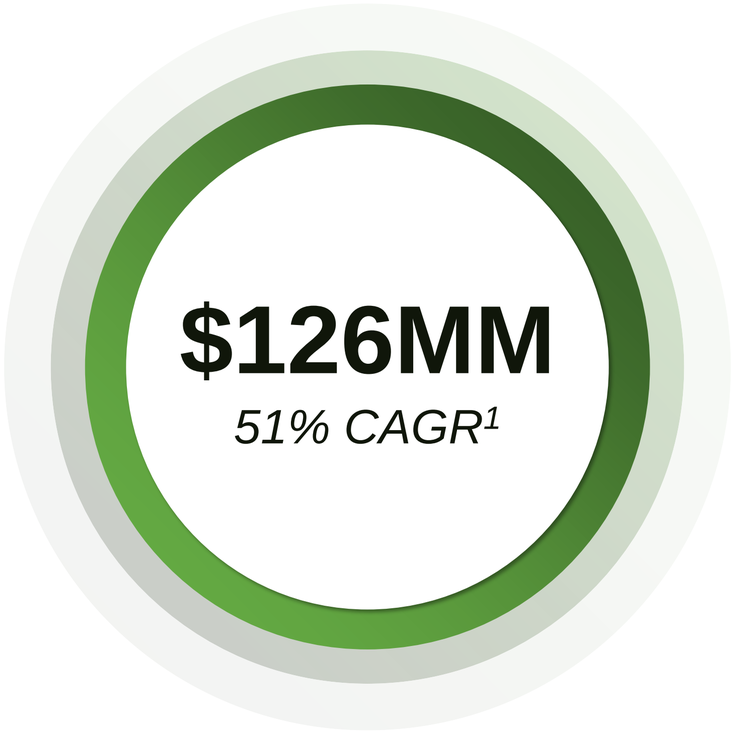


Job creation and industrial growth as the development of the renewable energy sector is expected to create numerous job opportunities and contribute to economic growth

Source: Columbia Center on Global Energy Policy; Grand View Research; Report Ocean; Saudi Vision 2030; KAUST FutureComposites; Team analysis

Nonmetallic Renewables Market Overview

Nonmetallic Renewables market snapshot



2024 KSA market size for opportunities in today's workshop

Three opportunities to be discussed today

1. Carbon Fiber Wind Blades
2. Fuel cells
3. Fuel cells subcomponents

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1. 5-year forecasted KSA CAGR (2024-2029)

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Carbon Fiber Wind Blades

Renewables Workshop

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Opportunity profile – Carbon Fiber Wind Blades

1

Carbon Fiber Wind Blades needed to meet 2030 renewable energy targets

Carbon Fiber Wind Blades

2

Substantial growth forecasted for Carbon Fiber Wind Blades market

$678MM

Estimated 2029 KSA market size

110%

Forecasted 5-year CAGR

3

Attractive investment opportunities in Carbon Fiber Wind Blades value chain

KSA value chain opportunities

Intermediate processes

Manufacturing

KSA enablers

- Tax credits on R&D investments
- Streamlined visa processes
- Quality certification funding

Source: Research and Markets; Global Wind Energy Council; Team analysis

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Potential Carbon Fiber Wind Blades localization categories

Carbon Fiber Wind Blades

Advantages compared to regular wind blades

- Lightweight: High strength-to-weight ratio, allowing blades to be lighter yet stronger
- Increased length: Enables production of longer blades, which capture more wind energy and improve turbine efficiency
- Superior stiffness: High rigidity minimizes blade deflection under wind loads
- Durability: Carbon fiber is highly resistant to fatigue, corrosion, and environmental degradation, leading to longer operational lifespans and reduced maintenance costs
- Enhanced performance: Supports higher rotational speeds and energy output due to its ability to withstand dynamic loads

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Industry standards: IEC 61400-2, DNV-ST-0376
Source: Team analysis

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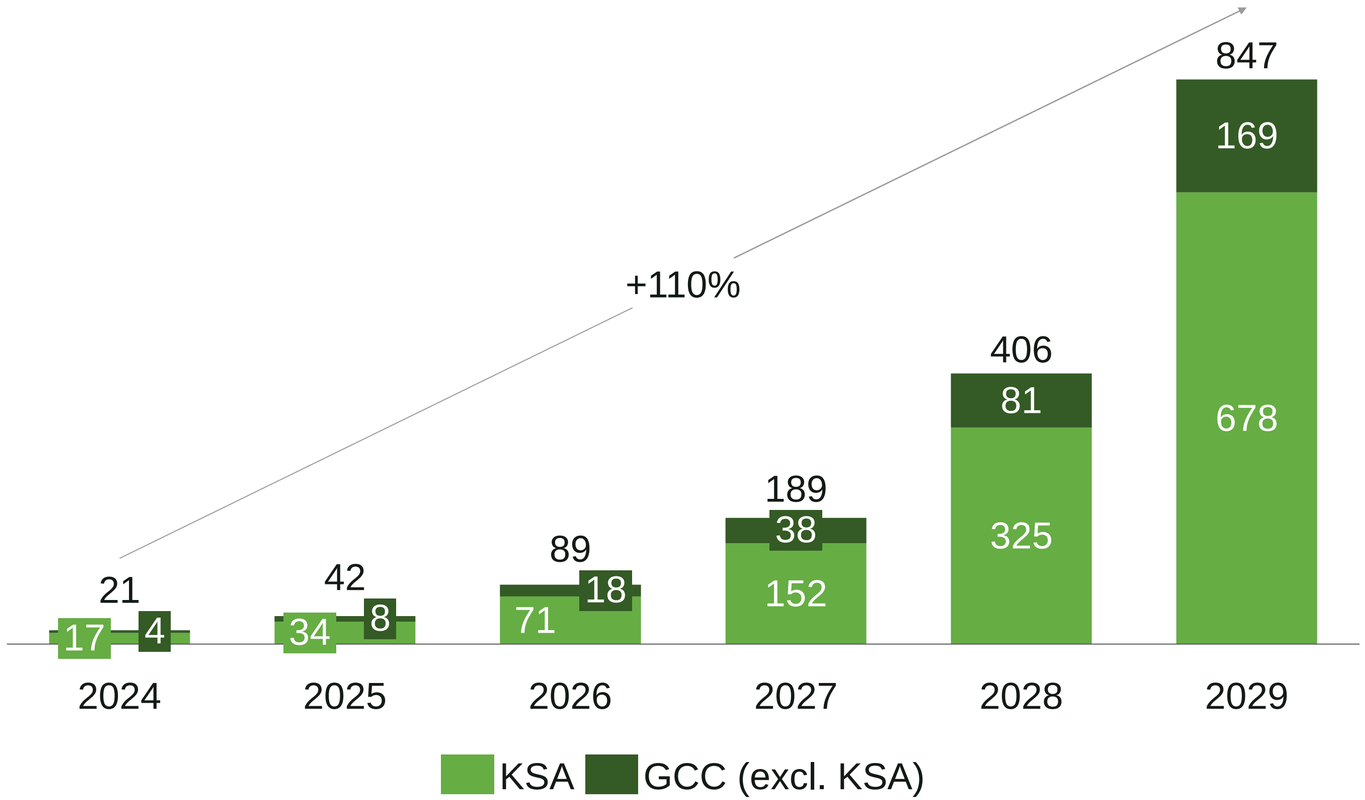
Carbon Fiber Wind Blades demand, customers, and drivers

Forecasted KSA and rest of GCC Carbon Fiber Wind Blades market 2024-2029 ($MM)



Typical KSA customers

- Wind turbine manufacturers
- Upstream energy firms

Key KSA demand drivers

- Vision 2030 goals: KSA aims to generate 50% of its power from renewable sources by 2030, with plans for 50 GW from wind energy
- Offshore wind expansion: Projects in Red Sea and Arabian Gulf drive demand for CF blades, as offshore turbines require longer blades for efficient energy capture

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Note: CF = Carbon fiber
Source: Research and Markets; Global Wind Energy Council; Team analysis

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Value chain and key localization opportunities

	Raw material	Intermediate processes	Manufacturing & assembly	CF wind blade customers
Local saturation	Multiple players	Few players	No players	
Current KSA value chain	Locally available in KSA: • Acrylonitrile • Epichlorohydrin • Silica sand	Establish production of: • PAN • Carbon fiber • Fiberglass • Epoxy resin	Localize manufacturing of: • Carbon fiber wind blades	Wind turbine producers Upstream energy firms
Key success factors		Opportunity	Opportunity	
Technology		Reactors, spinning lines, prepreg systems	Lay-up stations, curing ovens, welding	
Labor		Chemical and mechanical engineers	Composite technicians, machine operators	

Driving Prosperity

Note: CF = Carbon fiber
Source: Team analysis

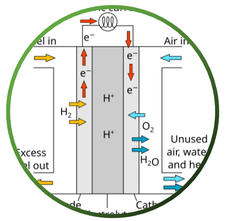
Fuel Cells

Opportunity profile – Fuel cells

1

Fuel cells needed for clean energy and achieving net zero

Types



Proton exchange membrane

Solid oxide

2

GCC fuel cell market is expected to grow rapidly in the coming years

$69MM

Estimated 2024 KSA market size

23%

Forecasted 5-year CAGR

3

Attractive investment opportunities in the fuel cell value chain

KSA value chain opportunities

Intermediate processes

Manufacturing

KSA enablers

- Fiscal incentives
- Investment support
- Workforce development

Source: Research and Markets; Global Wind Energy Council; Team analysis

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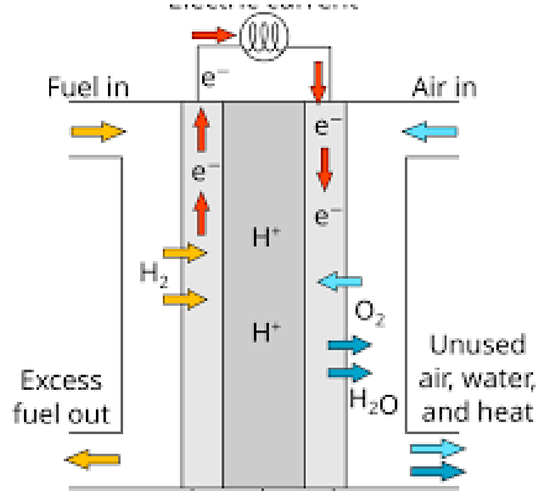
Potential fuel cell localization categories

Proton exchange membrane



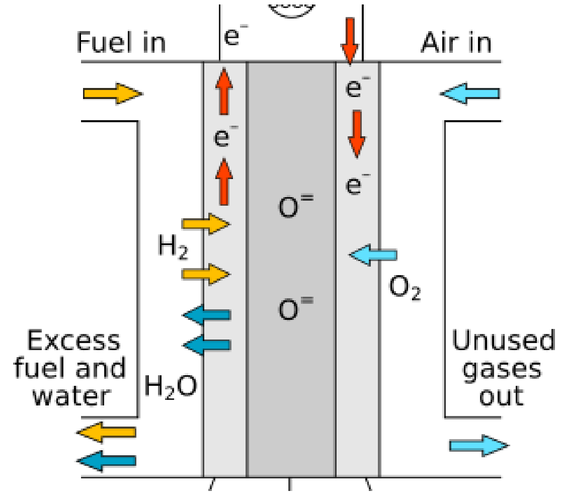
Definition

Energy generation using H2. Lower operating temperature and faster start-up making compatible for:

Applications

- Mobility (e.g., FCEV)
- Mobile backup power for remote locations

Solid oxide



Energy generation using H2 and HC. Higher efficiency and fuel flexibility for:

- Industrial energy systems
- Continuous power supply (large scale)

Note: Non-exhaustive; HC = Hydrocarbons
Source: Team analysis

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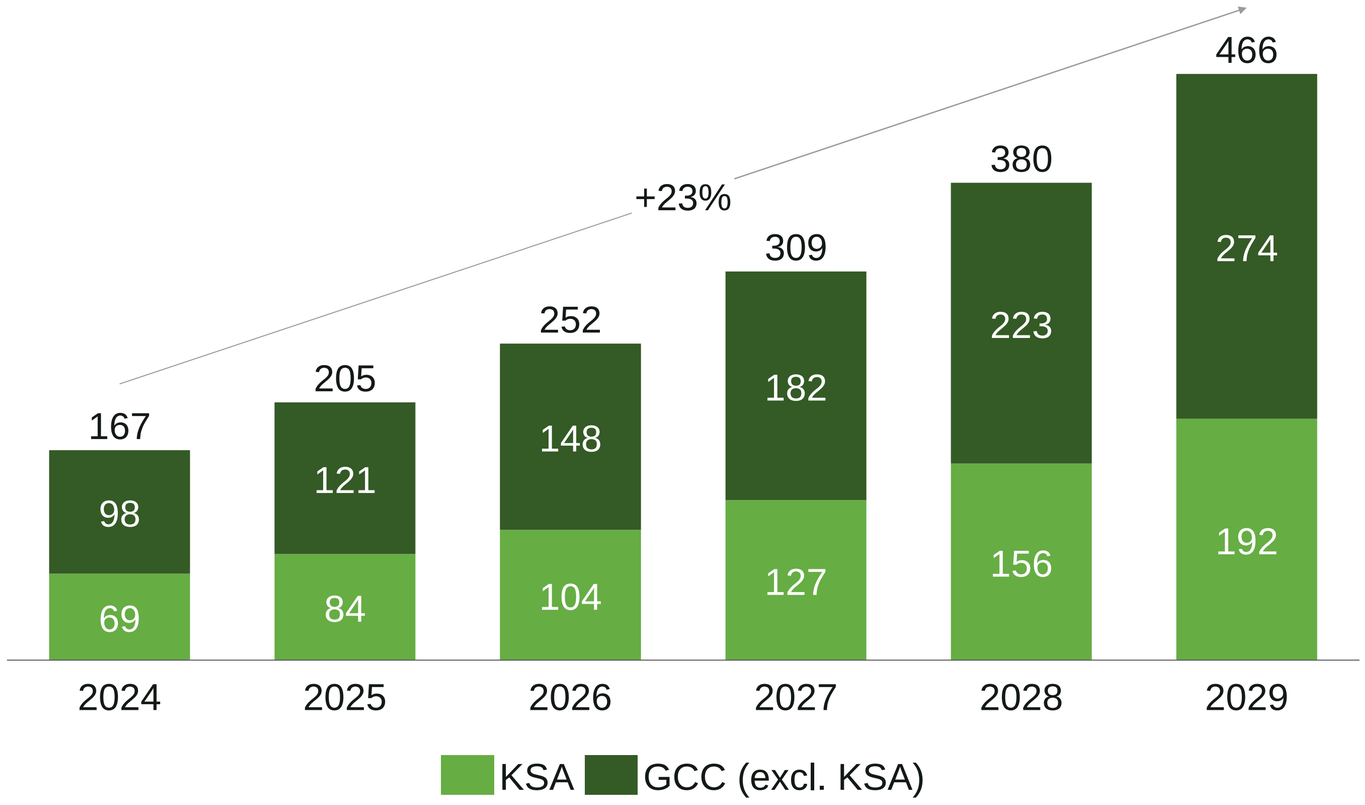
Fuel cell demand, customers, and drivers

Forecasted KSA and other GCC fuel cell market 2024-2029 ($MM)



Typical fuel cell customers in KSA

- Residential developers
- Utility providers
- Data centers

Key KSA demand drivers

- Technological development: Improved fuel cell efficiency, durability, and cost reductions making them competitive with traditional energy sources
- Hydrogen projects: Ongoing development of hydrogen production facilities set to produce 650 tons of hydrogen per day by 2030 set to drive fuel cell demand

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Driving Prosperity

Source: Market research future; Team analysis

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Value chain and key localization opportunities

	Raw material	Intermediate processes	Manufacturing & Assembly	Fuel cell customers
Local saturation	Multiple players	Few players	Few players	
Current KSA value chain	Locally available: • CFRP composites • H2 feedstock[1] • Chemicals • Precious metals[2]	Localize production: • Bipolar plates • Membranes • PEM/SOFC unit cell	Localize production for: • Fuel cell stacks • Fuel cell systems	Residential developers Utility providers Data centers
Key success factors		Opportunity	Opportunity	
Technology		Compression molding, CNC, coating, lamination press, cutting machines	Compression, coating, cutting machines, quality control	
Labor	Chemical, materials, mechanical, control, and electrical engineers, system designers			

Driving Prosperity

1. Under development 2. For import
Note: Non-exhaustive; CFRP = Carbon Fiber Reinforced Polymer; PEM = Proton Exchange Membrane; SOFC = Solid Oxide Fuel Cell
Source: Team analysis

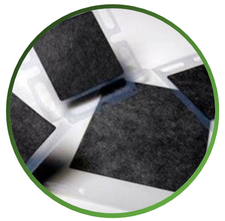
Fuel Cells Subcomponents

Opportunity profile – Fuel cells subcomponents

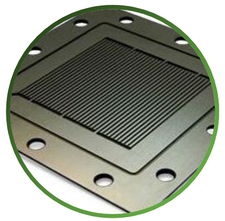
1

FC components needed to support ongoing fuel cell expansion

Types



Membrane electrode assembly



Bipolar plates

2

FC subcomponent market expecting rapid growth in coming years

$41MM

Estimated 2024 KSA market size

23%

Forecasted 5-year CAGR

3

Attractive opportunities in the FC sub-component value chain

KSA value chain opportunities

Intermediate processes

Manufacturing

KSA enablers

- Fiscal incentives
- Investment support
- Workforce development

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Note: FC = Fuel cells
Source: Springer nature; AIP publishing; Expert interviews; Team analysis

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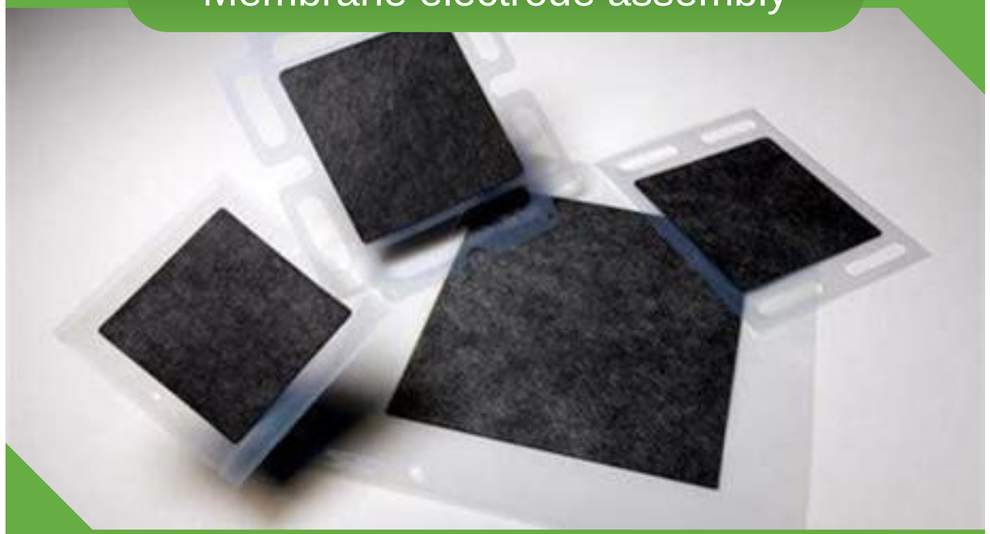
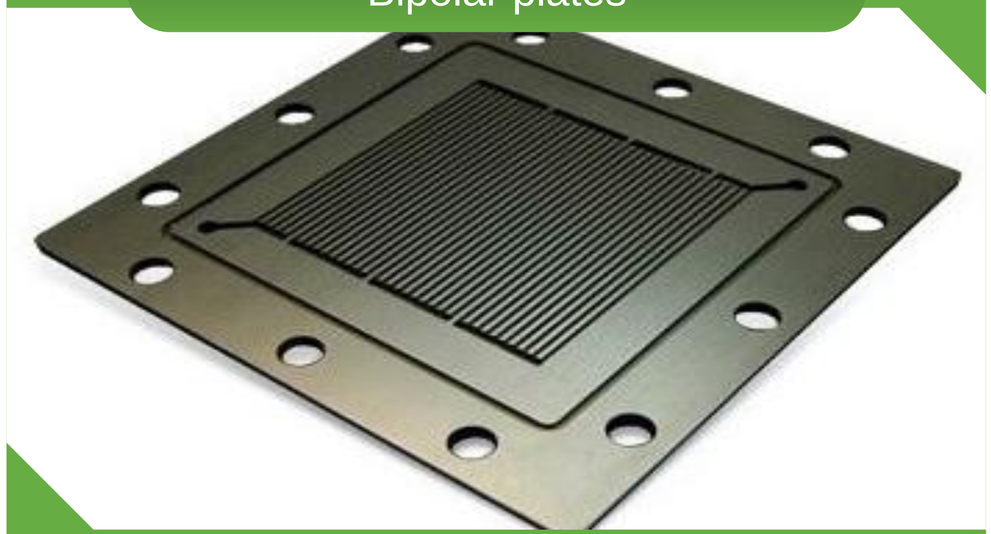
Potential fuel cells subcomponents localization categories

Membrane electrode assembly



Bipolar plates



Applications

- Converts hydrogen and oxygen into water, electricity, and heat by electrochemical reaction

- Separate and distribute H2 and oxygen evenly to the fuel cell
- Interconnect fuel cell unit cells and conduct electricity in a fuel cell stack

Note: Non-exhaustive
Source: Team analysis

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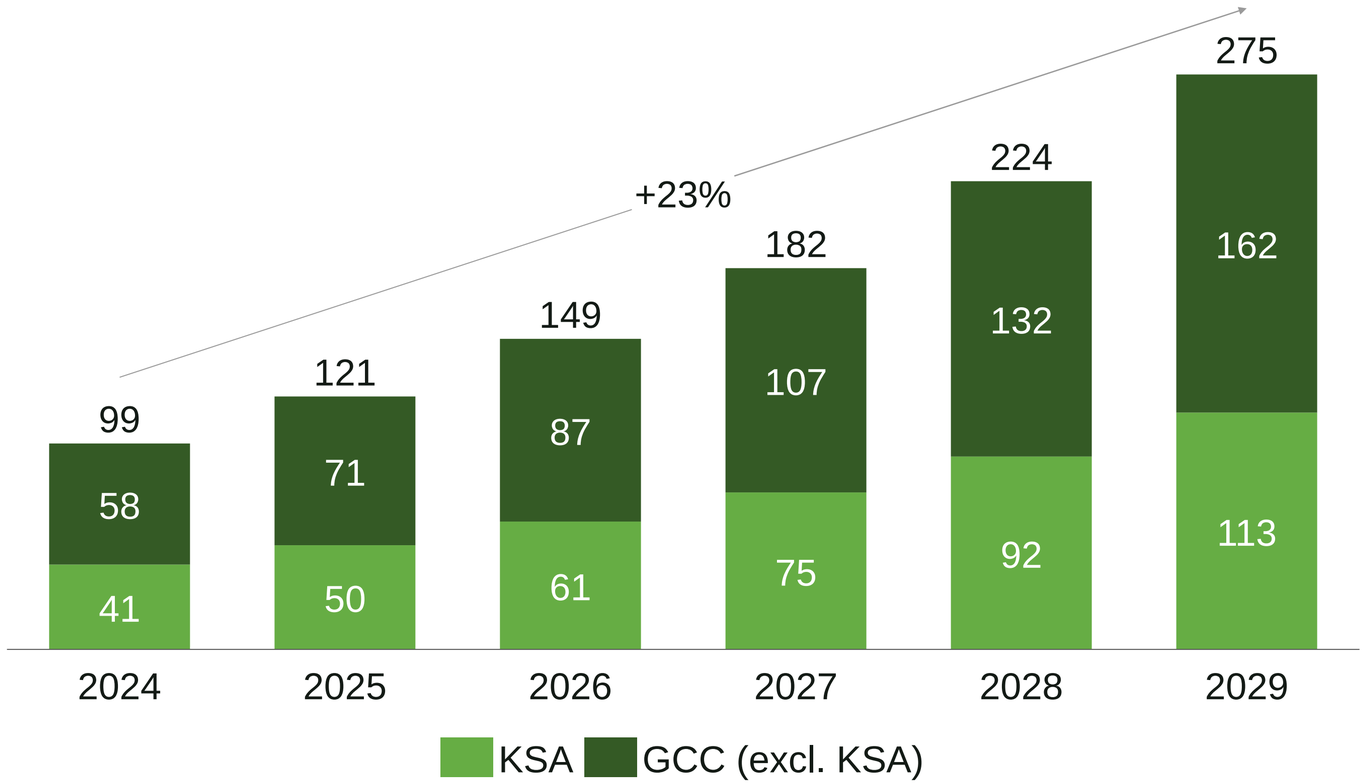
Fuel cells subcomponents demand, customers, and drivers

Forecasted KSA and other GCC fuel cell subcomponent market 2024-2029 ($MM)



FC component customers

Fuel cell manufacturers

Key demand drivers

- Technological development: Improved fuel cell efficiency, durability, and cost reductions making them competitive with traditional energy sources
- Hydrogen projects: Ongoing development of hydrogen production facilities set to produce 650 tons of hydrogen per day by 2030 set to drive fuel cell demand

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Source: Market research future; Team analysis

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Value chain and key localization opportunities

	Raw material	Intermediate processes	Manufacturing & Assembly	Fuel cell customers
Local saturation	Multiple players	Few players	Few players	
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Key success factors		Opportunity	Opportunity	
Technology		Compression molding, CNC, Coating, lamination press, cutting machines	Compression, coating, cutting machines, Quality control	
Labor	Chemical, materials, mechanical, control, and electrical engineers, system designers			

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1. Under development 2. For import
Note: Non-exhaustive; CFRP = Carbon Fiber Reinforced Polymer; PEM = Proton Exchange Membrane; SOFC = Solid Oxide Fuel Cell
Source: Team analysis

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Nonmetallic

Automotive workshop

Business Opportunities Review

Non-exhaustive

Four key drivers in the KSA automotive market

Consumer industry trends

- Large KSA automotive tire demand in 2024 (~24MM units)
- KSA aims to become an automotive hub, attracting OEMs, tier 1 suppliers, and autonomous vehicle technology

Technological advancements

- PIF is investing in EV and hydrogen technology, infrastructure, and high-tech manufacturing to localize a sustainable, innovative industry

Sustainability and environmental regulations

- Vision 2030 targets 30% EV penetration by 2030, driving EV manufacturing and charging infrastructure demand

Economic & demographic factors

- Average KSA monthly household transport spending increased by ~30% between 2019 and 2024

Source: Invest Saudi; US-SAUDI Business Council; Saudi Industrial Center; Statista

Nonmetallic Automotive Market Overview

KSA Automotive market snapshot

2024 KSA market size for opportunities in today's workshop

Two opportunities to be discussed today

1. Composite battery enclosure
2. Tires

1. 5-year forecasted KSA CAGR (2024-2029)

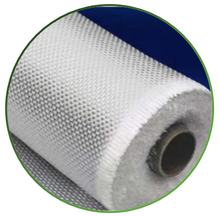
Composite Battery Enclosure

Opportunity profile – Composite Battery Enclosure

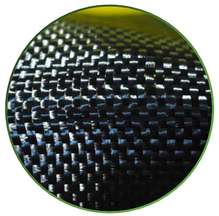
1

KSA in strong position to localize enclosure production

Types



Glass fiber reinforced polymer



Carbon fiber reinforced polymer

2

Battery enclosure market is sizeable with significant forecasted growth

$60MM

Estimated 2029 KSA market size

176%

Forecasted 5-year KSA growth

3

Attractive investment opportunities in the battery enclosure value chain

KSA value chain opportunities

Raw Material

Intermediate

Mfg.

KSA enablers examples

- Loans and financing through SIDF
- Skilled labor through HRDF programs
- Accelerated investor license support

Nonmetallic automotive

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Note: SIDF = Saudi Industrial Development Fund; HRDF = Human Resource Development Fund
Source: Lucid motors; Ceer; Hyundai; PIF; Composites world; Team analysis

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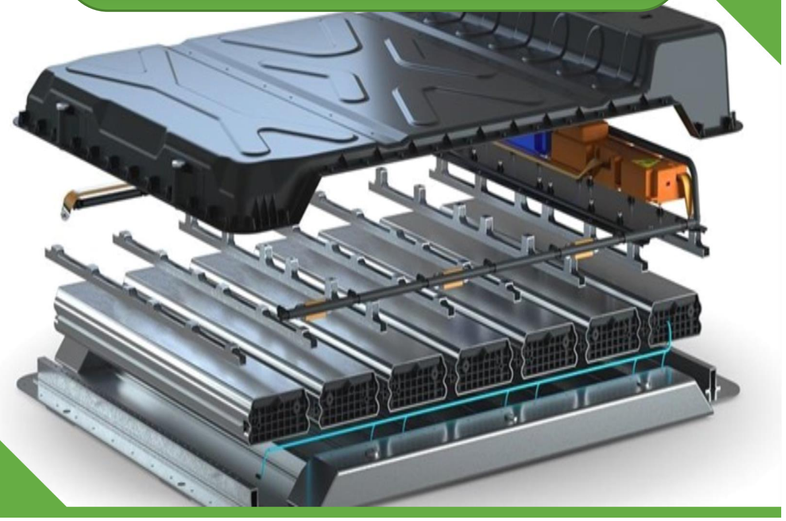
Composite Battery Enclosure Opportunity Overview

Definition Lightweight protective housings for electric batteries for electric vehicles made of composite materials

Composite Battery Enclosure



Product Details

- Materials: Made from fiber reinforced polymers, such as a carbon fiber or glass fiber and a resin system based on thermoplastics or thermosets
- Advantages vs metallic: Outstanding part integration, lighter, better corrosion resistance, and engineered for superior thermal insulation and safety (fire retardancy)
- Application: Passenger vehicles, trucks, buses
- Logistics: Production in proximity to factory advantageous due to bulky nature of product

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Source: Team analysis

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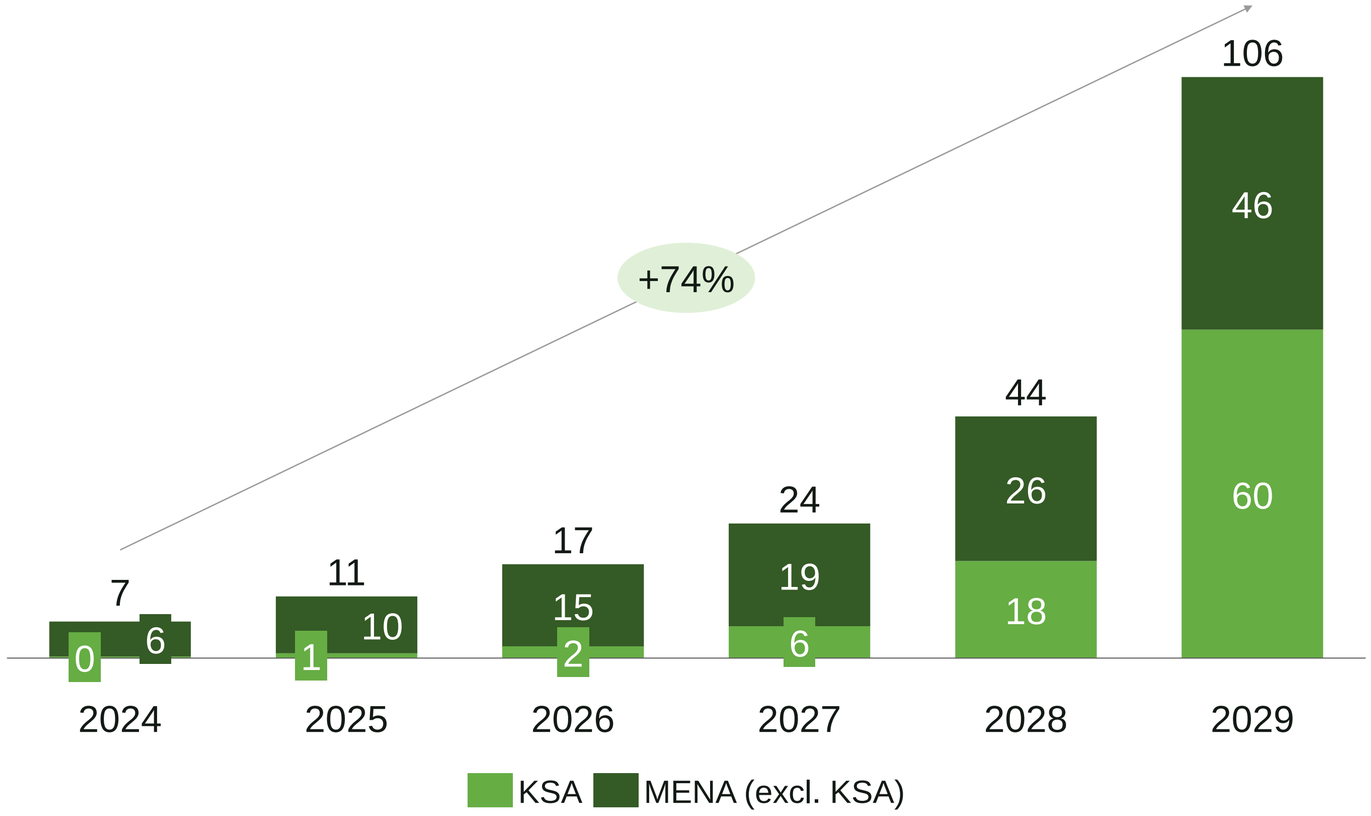
Composite Battery Enclosure demand, customers, and drivers

Forecasted KSA and MENA battery enclosure market 2024-2029 ($MM)



Typical battery enclosure customers

- Electric vehicles OEMs
- Electric truck manufacturers

Key KSA demand drivers

- Light weighting trend: Nonmetallic enclosures offer light-weight, higher part integration and a path to decrease the carbon footprint of the component
- Rising local production: Expansion of domestic EV manufacturers such as Ceer, Lucid Motors and Hyundai with annual production of 455 000 EV by 2030

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Source: Lucid motors; Ceer; Hyundai; PIF; Composites world; Team analysis

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Value chain and key localization opportunities

	Raw material	Intermediate processes	Manufacturing & Assembly	Battery enclosure customers
Local saturation	Mixed	Few players	No players	
Current KSA value chain	Locally available: • Silica Sand, petrochemical derivatives Opportunity to localize: • CF and GF manufacturing Opportunity	Opportunity to localize: • Thermoplastic and thermoset resins • Pellets and fabrics • Prepregs Opportunity	Localize production battery enclosures including: • CFRP/GFRP components • Automation, machining and assembly Opportunity	Electric Vehicles OEMs Electric truck/bus manufacturers
Key success factors				
Technology	CF/GF manufacturing systems	Knitting and prepregs manufacturing, resin formulation and manufacturing	Non-metallic manufacturing equipment, machining, automation and testing	
Labor	Chemical, materials, quality & mechanical engineers, process operators		Materials & mechanical engineers, Machine operators	

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Note: ECH = Epichlorohydrin; PAN = Polyacrylonitrile; GFRP = Glass Fiber Reinforced Polymer; CFRP = Carbon Fiber Reinforced Polymer
Source: Team analysis

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Investment opportunity and enablers

Non-exhaustive

Key enablers in KSA to drive success

Financial Incentives: SIDF offers working capital loans in the initial phase and benefits for SMEs under Afaq program for plant setup

Land and infrastructure: Subsidized land and infrastructure in automotive economic zones such as KAEC reduces setup costs

Workforce Development: Fully covered or subsidized training programs by HRDF for productions operations

Where is the opportunity

Raw material	Localize production of carbon fiber and glass fiber
Intermediate	Localize production of Thermoplastic and thermoset resins pellets, fabrics and prepregs
Manufacturing	Localize manufacturing CFRP/GFRP components

Nonmetallic automotive

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Note: SIDF = Saudi Industrial Development Fund; KAEC = King Abdullah Economic City; HRDF= Human Resource Development Fund; ECH = Epichlorohydrin; PAN = Polyacrylonitrile; CFRP = Carbon-fiber Reinforced Polymer; GFRP = Glass Fiber Reinforced Polymer Source: Expert interviews; Govt websites; Team Analysis

Tires

Opportunity profile – Tires

1

Tires needed for growing passenger and commercial vehicles demand

Types

Passenger

On-highway

Off-highway

2

GCC Tires market is sizeable with steady forecasted growth

$549MM

Estimated 2024 KSA market size

5%

KSA forecasted growth

3

Attractive investment opportunities in the Tires value chain

KSA value chain opportunities

Manufacturing

Lifecycle management

KSA enablers examples

- Land and infrastructure in KAEC
- Wide geographic export accessibility
- Duty exemptions for exported goods

Nonmetallic automotive

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Note: KAEC = King Abdullah Economic City; HRDF= Human Resource Development Fund
Source: TechSci Research; Expert interviews; Team analysis

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Potential Tires localized categories

	Passenger	On-highway	Off-highway
			
Definition	Consumer tires for light vehicles	Industrial tires for on-road use	Industrial tires for off-road use
Applications	• Personal cars • Motorbikes • Camper vans	• Light trucks • Buses • Long-haul trucks	• Construction vehicles • Heavy duty mining loaders • Agricultural machinery

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Source: Team analysis

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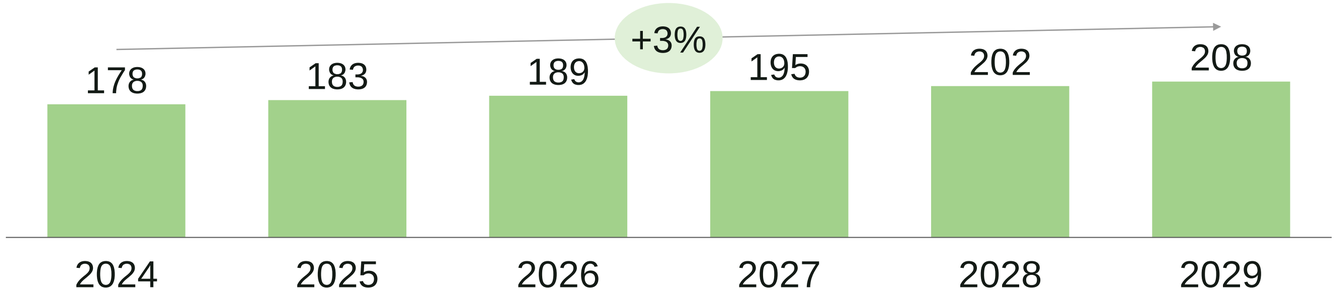
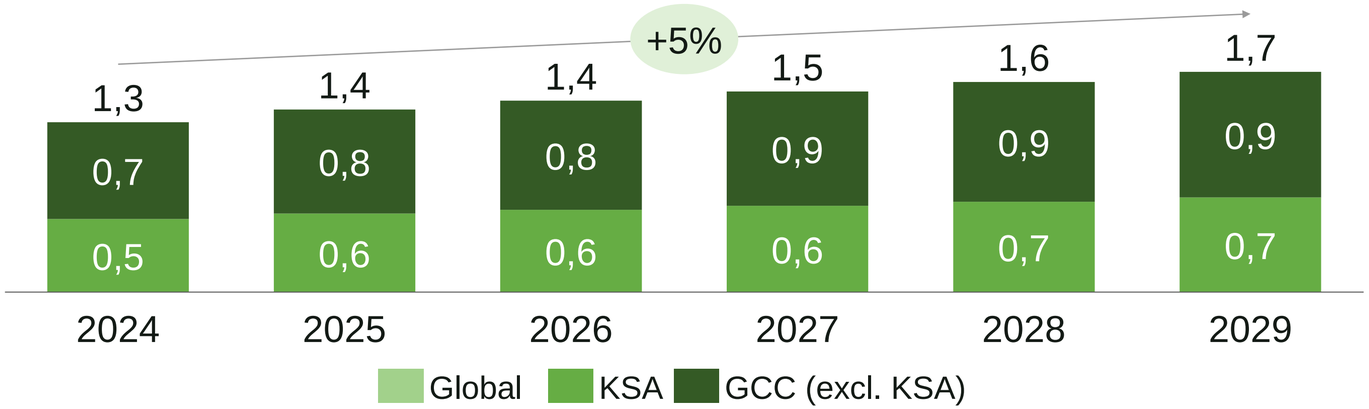
Tires demand, customers, and drivers

Forecasted Global Tires market 2024-2029 ($Bn)



Forecasted Global, KSA, and other GCC Tires market 2024-2029 ($Bn)



Typical tires customers in KSA

- Individual vehicle owners
- Logistics companies
- Construction firms

Key KSA demand drivers

- Rising local production: Expansion of domestic EV manufacturers such as Ceer, Lucid Motors and Hyundai with annual production of 455,000 EV by 2030
- Infrastructure expansion: Rising construction, mining, and transportation projects are boosting commercial vehicles tires demand

Nonmetallic automotive

Driving Prosperity

Source: Lucid motors; Ceer; Hyundai; PIF; TechSci Research; Expert interviews; Team analysis

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Value chain and key localization opportunities

	Raw material	Manufacturing & assembly	Tire customers	Lifecycle management
Local saturation	Multiple players	Few players	Individual vehicle owners Logistics companies Construction firms	Few players
Current KSA value chain	Locally available in KSA: • PBR • SBR • Textile cords	Expand manufacturing of: • Vulcanized rubber • Passenger car tires • On/off-highway tires		Localize recycling of: • Rubber
Key success factors		Opportunity		Opportunity
Technology		Extrusion, calendaring, curing[1], and IIoT equipment		Shredders, granulators, pulverizes, pelletizers
Labor		Mechanical and process engineers		Materials specialists, technicians

Nonmetallic automotive

Driving Prosperity

1. Particularly for vulcanization for vulcanized rubber
Note: PBR = Polybutadiene Rubber ; CBR = High cis-1,4-polybutadiene rubber; IIoT = Industrial Internet of Things
Source: Manufacturing equipment vendor database; Expert interviews; Team analysis

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Investment opportunity and enablers

Non-exhaustive

Key enablers in KSA to drive success

- **Land and infrastructure:** Subsidized land and infrastructure in automotive economic zones such as KAEC reduces setup costs
- **Geographical accessibility:** Strategic location enables exports to neighboring markets, with available tax exemptions
- **National R&D support:** Access to applied research on plastic and rubber materials from leading entities e.g. HIPF
- **Workforce Development:** Fully covered or subsidized training programs by HRDF for productions operations

Where is the opportunity

Manufacturing

Localize manufacturing of tires across application areas

Lifecycle management

Establish recycling facilities for rubber and metals

Nonmetallic automotive

Driving Prosperity

Notes: KAEC = King Abdullah Economic City; HIPF = Higher institute for Plastics; HRDF= Human Resource Development Fund
Source: Expert interviews; Govt websites; Team Analysis

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Thank You

Driving Prosperity