Royal Commission for Jubail & Yanbu

Saudi Automotive Conference

June 26, 2013
• Major Highlights
• Royal Commission
Cities
  ▪ Industrial Development
  ▪ Investment Opportunities
  ▪ Quality of Life
• Concluding Remarks
Royal Commission Major Highlights

- **GDP**
  - 9.6% of KSA GDP.
  - 20.2% of KSA Non-Oil GDP.

- **Production**
  - 9.0% of the world petrochemicals production

- **Growth**
  - 20.2% Average annual growth rate of FDI

- **Investment**
  - 65% of GCC Industrial Investment
Royal Commission
For Jubail and Yanbu
Royal Commission Cities

- Access to local feedstock.
- Strategic location.
- Modern world-scale infrastructure.
- Attractive financing support.
- Well-developed communities.
- Attractive energy costs.
- Attractive land lease rate.
The best choice for investors in petrochemicals and energy-intensive industries and the leading contributor to the Kingdom’s growth.
Mission

Plan, promote, develop, and manage petrochemical and energy-intensive industrial city.
Jubail Industrial City – Overview Map

Total Area 1,062KM²
Ras Al-Khair Industrial City – Overview Map

Total Area 120KM²
Industrial City Development Plan

**Industry**
- Establish as a hub for business and industry
- Maximize high-value, high-skill sectors
- Expand partnerships

**Community**
- Expand world-class workforce institutions
- Create a high-quality of life

**City Management**
- Implement best practices to be an international efficiency leader
State-of-Art Infrastructure

- King Fahad Industrial Port
- National Land Bridge Railway
- Power & Utilities
King Fahd Industrial Port

Yanbu Industrial City
- Major Expansion will be completed in 2017
- 7 Terminals with 24 Berths
- In 2012, port handled 101 Million ton/Year
- Total Capacity is 190 million Tones/Year
National Land Bridge Railway

- Access to different markets
- Connecting all RC cities
- Planned to be completed in 2017
Reliable Energy & Utilities

Yanbu Current Capacity Under Construction

<table>
<thead>
<tr>
<th></th>
<th>Current Capacity</th>
<th>Under Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power</td>
<td>1,038 MW</td>
<td>2,938 MW</td>
</tr>
<tr>
<td>Desalination</td>
<td>150,000 M³/D</td>
<td>500,000 M³/D</td>
</tr>
</tbody>
</table>

3 Power Plants to Supply Yanbu City

......Reliable Source of energy and doorstep utilities
Yanbu Industrial City

- 3rd largest Global refining hub with more than 1.0 Million Barrel per day capacity.
- Total investment is over $53 Billion.
- Average annual growth rate of private sector investments is 18%.
- Largest oil shipping port on the Red Sea & major liquid handling terminal.
Industrial Investment in Royal Commission Cities
## Industrial Investment Development

<table>
<thead>
<tr>
<th>Industry</th>
<th>No.</th>
<th>Investment (US$ Billion)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>50</td>
<td>146</td>
</tr>
<tr>
<td>Secondary</td>
<td>81</td>
<td>12</td>
</tr>
<tr>
<td>Light</td>
<td>393</td>
<td>3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>524</td>
<td><strong>161</strong></td>
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</table>
Sustainable Industrial Development

No. of Primary & Secondary Industries in Operation
Our Partners
Investment Opportunities in Royal Commission Cities
<table>
<thead>
<tr>
<th>Industry</th>
<th>2012</th>
<th>2020</th>
<th>8 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Petrochemicals</td>
<td>$3.5 BL</td>
<td>$3.2 BL</td>
<td></td>
</tr>
<tr>
<td>Mining</td>
<td>$1.8 BL</td>
<td>$2.1 BL</td>
<td></td>
</tr>
<tr>
<td>Water Desalination</td>
<td>$2.6 BL</td>
<td>$4.5 BL</td>
<td></td>
</tr>
<tr>
<td>Petroleum Industry</td>
<td>$2.6 BL</td>
<td>$4.5  BL</td>
<td>$ 61 Billion</td>
</tr>
<tr>
<td>Chemicals</td>
<td>$3.2 BL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Autozone Industry</td>
<td>$3.2 BL</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total Opportunities:**
- Petroleum Industry: $2.6 BL
- Chemicals: $3.2 BL
- Mining: $1.8 BL
- Water Desalination: $2.1 BL
- Renewable Energy: $4.5 BL

**8 Years Development:**
Yanbu AutoZone Site Map

- Develop required infrastructure
- Customize workforce training programs
- Make required Port improvements
- Total Area 1,000 HA & catered for 5 OEM’s.
- Phase I of land is already developed
AutoZone Enabling Industries

- **Online**
  - **Saudi Kayan Polycarbonate Project**
  - **SABIC Engineering Thermoplastic & PP countering**
  - **End of 2013**
  - **Chevron Philips Nylon project & Conversion project**
  - **By 2015**
  - **SABIC & ExxonMobil’s Elastomer Project**
  - **By 2015**
  - **Al Amoudi Group Advanced Tire manufacturing**
  - **By 2015**
  - **Ras Al-Khair Aluminum Downstream facilities**
  - **By 2015**
  - **PetroKemya ABS Project**
  - **By 2015**
  - **Tasnee Emulsion project for automotive coatings**
RC PlasChem Park - Jubail

To attract the Plastic downstream conversion industries
To house the downstream chemical manufacturers
To provide common services & facilities
QUALITY OF LIFE IN RC CITIES
Developing Talented Workforce

Technical Institutes
No. of Students: 2,080
For Industries' Workforce

Industrial Colleges
No. of students: 9,225
6 specialties in Bachelor degree
7 specialties in Technical Diploma

Schools
No. of Schools: 143
No. of Students: 50,779

University Colleges
No. of students: 5,771
6 specialties in Bachelor
...Comprehensive medical facilities and services

- (2) RC Medical Centers
- (4) Private hospitals
- (21) Medical Clinics
...Active lifestyle opportunities

- (44) Recreation Centers
- (104) Courts, Football fields, swimming pools, equestrian club...
- (3) Central libraries
Over US$1.6 Billion investment in the Waterfront Project to enhance the quality of life in Yanbu Industrial City
Closing Remarks

- Global hub for industries
- Offer highly efficient infrastructures
- Expanding and developing sustainably
- Support positioning companies at the forefront of their business sectors
3rd Saudi Downstream Forum

Will be held on 4-5 March 2014
At King Fahd Civic Center, Yanbu Al-Sinaiyah
Kingdom of Saudi Arabia

For more information about participation, sponsorship, & exhibition
Please visit
http://www.saudidownstream.com/
Thank You!

http://www.RCJY.gov.sa