

Investment Insights 2025

Exploring MENA Region's Investment Scenario

ASCELA, involved in developing key logistics and mobility infrastructure in the MENA region and globally, has been monitoring recent investment prospects. The Index is an effort to evaluate the Investability of these subsectors in the MENA region.

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ASCELA



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FOREWARD

The global logistics and mobility sector stands at a transformative juncture, driven by technological advancements, shifting geopolitical landscapes, and an accelerating commitment to sustainability. The "ASCELA Insight Paper: Future of Logistics" presents a deep dive into the MENA region's logistics sector, offering a comprehensive analysis of trends, investment opportunities, and strategic directions that are reshaping this dynamic landscape.

As ASCELA's 18th edition of insights, this paper explores how regional initiatives are catalyzing growth while aligning with broader global goals like digitalization, decarbonization, and resilient infrastructure development. Our team has meticulously analyzed key developments across multimodal logistics—from port automation and rail connectivity to smart aviation systems and urban mobility innovations—illustrating how these themes align with national and regional aspirations like the UAE's Vision 2050 and Saudi Arabia's Vision 2030.

Through the lens of the ASCELA Investability Index, stakeholders are equipped with a robust framework to evaluate subsector opportunities, navigate challenges, and anticipate market dynamics in the post-2024 era. By leveraging rich data and actionable insights, the paper aspires to empower investors, policymakers, and industry leaders to make informed decisions that drive sustainable and inclusive growth.

We are excited to share this journey through the future of logistics, confident it will inspire progress and innovation across the MENA region and beyond.

Nivesh Chaudhary

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OPPORTUNITIES
ASCELA's Viewpoint



MENA Region Transport & Logistics: Bridging Continents, Driving Sustainability, and Shaping Global Trade

01 The Big Picture: Unlocking the MENA Region

Where does the MENA Region stand today?

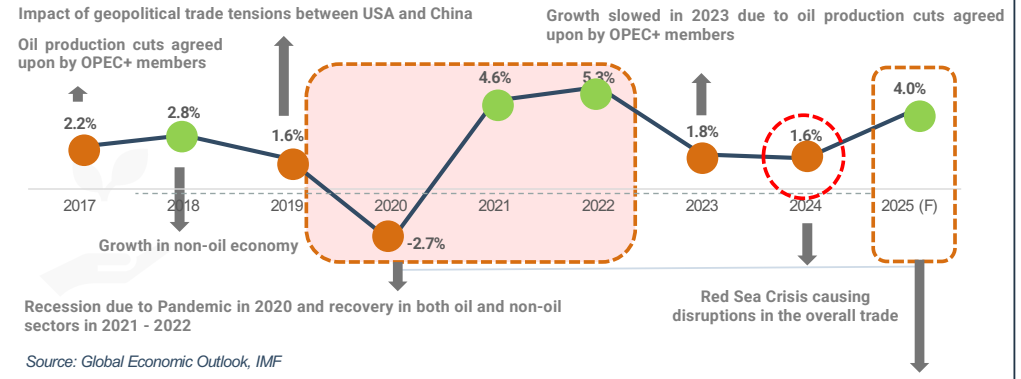
Leveraging its strategic location, the region has established itself as a global logistics powerhouse, enabling seamless connectivity across continents.

MARKET DYNAMICS

Exploring Pathways to Becoming a Global Trade Hub

What's happening?
The Middle East logistics industry is undergoing a significant transformation, driven by economic diversification initiatives, technological advancements, and substantial infrastructure investments aimed at sustainability.

Industry Insights



The anticipated shift towards a non-oil-based economy, particularly in Gulf Cooperation Council (GCC) countries such as Saudi Arabia, the UAE, and Kuwait, is poised to become a key driver of economic growth in 2025.

Key Snapshot of the Growth Drivers in the MENA Region





02 Sectoral Developments in UAE

UAE leads with ambitious port digitisation, cutting-edge rail connectivity, and AI-driven interventions, cementing its role as a logistics hub.

Themes	Highlights	Details	Investment Opportunities Within
01 Ports/ Shipping	Economic Partnership strengthening Bilateral Trade	UAE and Vietnam signed a Comprehensive Economic Partnership Agreement (CEPA), eliminating tariffs on majority of exports.	<ul style="list-style-type: none"> • Boost in export sector leveraging tariff-free access. • Expansion of maritime infrastructure • New export-oriented Industrial hubs.
	Maritime Infrastructure Enhancement	Completion of Mina Al Hamriya expansion project, located on the mainland of Dubai strengthening global trade capabilities.	<ul style="list-style-type: none"> • Sustainable trade solutions • Streamlining logistics operations
02 Railways	Hafeet Rail Project	USD 1.5 billion financing for the joint 238km long Emirati and Omani rail network linking UAE with Oman's port of Sohar.	<ul style="list-style-type: none"> • Trade and commercial ties in the region. • Opening of global gateways through airports and ports. • Advanced rail systems
	Floc Duo Rail	a driverless, electric pod system that will operate on roads, tunnels, and elevated tracks, supporting end-to-end transport or main public transit.	<ul style="list-style-type: none"> • Smart mobility solutions • Technology integration in public transport systems
03 Aviation	Expansion of Global Freight capacity by Emirates SkyCargo	Addressing air cargo demands with an order of 5 additional Boeing 777 freighters with a total operating fleet of 21 freighters by 2026.	<ul style="list-style-type: none"> • Modernisation of cargo hubs • Retrofitting for aircraft efficiency
	USD 35 billion Airport terminal at DWC	Al Maktoum International Airport is positioning Dubai as a global aviation leader with AI, reducing dwell time and streamlining passenger and cargo movement.	<ul style="list-style-type: none"> • International tourism and transit • AI - Powered aviation systems • Behaviour analytics and operational workflows

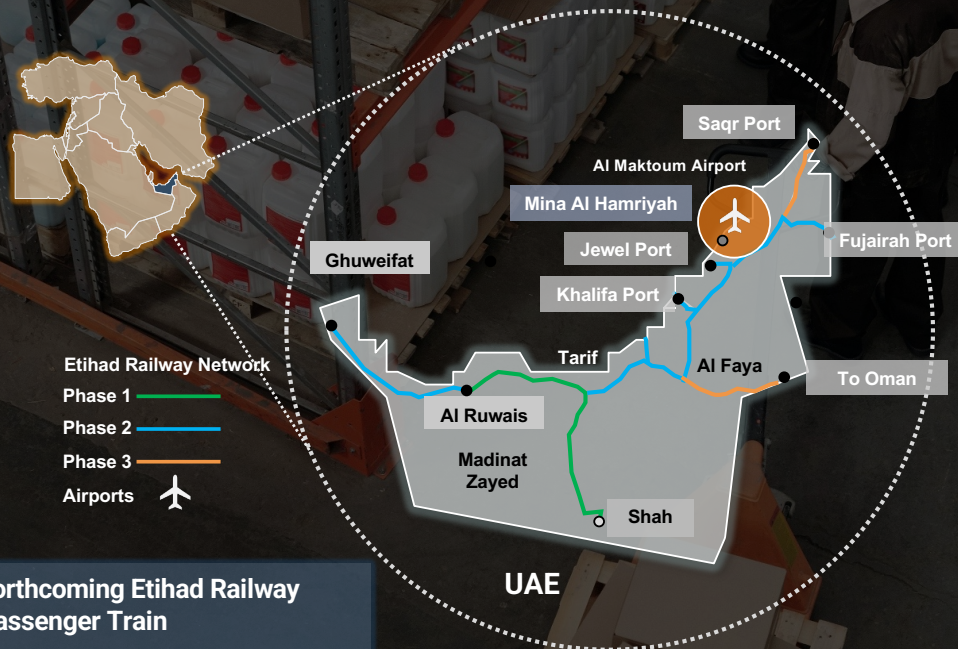
■ Sustainability
 ■ Development Plans
 ■ Policy Framework
 ■ Technology Upgradation

ASCELA's View

UAE's investment in Transportation and infrastructure signals a robust and forward-thinking approach to future - proofing its economy with the push towards automated transport systems, and advanced logistics hubs.

“Driving UAE Transformation through Innovation, Strategic Policies, and Collaborative Partnerships”

Key Upcoming Developments in the Region



Forthcoming Etihad Railway Passenger Train

- ✓ Faster, Greener and more convenient
- ✓ 900Km-long Etihad rail passenger train to connect 11 cities
- ✓ First passenger stations anticipated at Sakamkam and Fujairah.

Al Maktoum International Airport

- ✓ Designed to accommodate the largest aircraft
- ✓ Energy efficient design
- ✓ Eco-friendly Operation

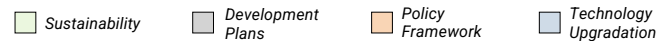
Al Mina Hamriya Expansion Completion

- ✓ Enhanced Port's operational capacity
- ✓ State-of-the-art Infrastructure
- ✓ Investment opportunities in logistics, warehousing, and maritime services

02 Sectoral Developments in UAE (Cont.)

The UAE leads with ambitious port digitization, advanced rail connectivity, and AI-powered aviation, solidifying its position as a global logistics hub.

Themes	Highlights	Details	Investment Opportunities Within
04 Urban Mobility	Trackless Trams Initiative across emirates	8 locations across the Emirates to operate electric trackless trams in the region to prioritise eco-friendly transportation by RTA.	<ul style="list-style-type: none"> • Public transport expansion • Smart monitoring systems and virtual track mapping
	Transformative USD 4.36 billion 2024-27 Main Road Development Plan	Addition of 22 projects for road capacity expansion, integration of AI traffic systems with enhanced infrastructure.	<ul style="list-style-type: none"> • AI-based traffic management systems • Advance cycling track technology • Autonomous transport innovation
	Partnerships to explore Sustainable Urban Mobility Solutions	Urbanloop and Abu Dhabi Terminals joined forces to integrate eco-friendly technology to upgrade mobility.	<ul style="list-style-type: none"> • Low-carbon footprint goals • Smart mobility solutions • Innovative transport modules
05 Logistics and Warehousing	Middle East's largest Quartz Facility in JAFZA	Global Surfaces' facility harnesses Dubai's connectivity and infrastructure to supply quartz-based materials to regional and international markets, catering to the growing demand in the real estate and construction sectors.	<ul style="list-style-type: none"> • Increase in demand due to expansion in real estate • Increased logistics support demand
	Last Mile Drone Delivery	Drone delivery commenced and is set to expand, reaching 33% coverage by 2030 to enhance smart mobility for essentials, emergency services, and medical supplies.	<ul style="list-style-type: none"> • Focus on sustainable and smart delivery • Advanced drone technology
	Ambitious Logistics City Plan	Umm Al Quwain announces the establishment of an integrated logistics city with a state-of-the-art airport contributing to the economy.	<ul style="list-style-type: none"> • Logistics Support Infrastructure • Seamless trade • AI driven operations



ASCELA's View

The UAE is set for remarkable growth by 2025, fueled by transformative infrastructure projects spanning aviation, urban mobility, and logistics. Investors can anticipate strong returns as the UAE continues to lead in innovation and strategic development, with collaborative partnerships unlocking an array of new opportunities.

03 Sectoral Developments in Saudi Arabia

Snapshot of Key Sector Developments in Saudi Arabia

NEOM

NEOM-OXAGON is targeted to be the world's first 4.3 miles-wide floating city and largest fully automated port and integrated logistics hub, to be developed by 2030.

GCC Rail

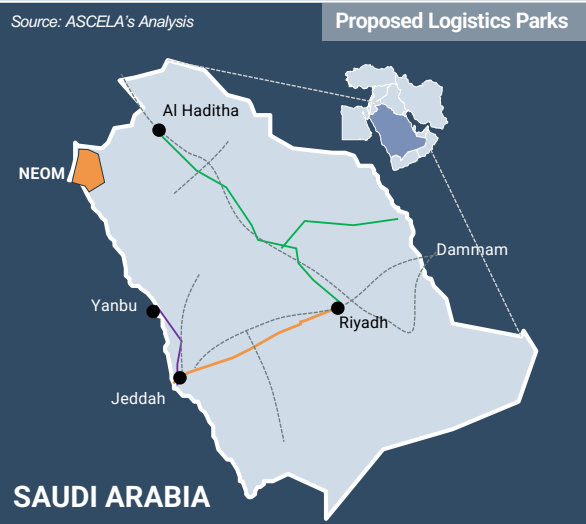
The GCC Rail Network, set for completion by 2030, will seamlessly connect all GCC nations, revolutionizing regional trade, and logistics with smart, sustainable solutions.

King Abdullah Sea Port

Saudi Arabia's first privately owned port, is undergoing expansion to increase its capacity to over 25 MTEU annually.

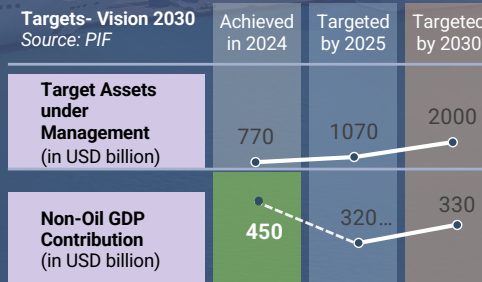
Maersk Logistics Park (Jeddah Free Zone)

Maersk Logistics Park in Jeddah, spanning 225,000 Sq.m., integrates advanced warehousing and distribution, aiming to handle 200,000 TEUs annually.



Themes	Highlights	Details	Investment Opportunities Within
01 Ports/ Shipping	Digital Twin Technology	Siemens integrates Mevea's digital twins into crane automation at NEOM's Oxagon port, enabling automated STS cranes and electric RTG cranes.	<ul style="list-style-type: none"> Automation and Robotics Green Energy Solutions
	Propel Innovation in Port Operation	Mawani, Hamburg Port Authority (HPA), and Hamburg Port Consulting (HPC) have signed a MOU to build smarter, greener and more resilient ports.	<ul style="list-style-type: none"> Smart Port Technologies Workforce Upskilling Renewable energy actions
02 Railways	Freight Sector Partnerships	SAR has partnered with Bahri Logistics, Maersk, and MSC to enhance freight forwarding with progress on the Landbridge project connecting the Red Sea and Arabian Gulf.	<ul style="list-style-type: none"> Enhance Rail Maritime Connectivity Privatisation in rail system Enhance trade and logistics
	Enhanced Passenger train and Luxury train services	SAR to launch a luxury train service, the "Desert Dream," in late 2025 and maintain 20 Next Gen Passenger train services.	<ul style="list-style-type: none"> High Speed Rail Infrastructure Development of regenerative tourism destination
03 Aviation	Partnerships for upcoming King Salman International Airport	KSIADC has partnered with SILZ and FedEx and has joined International Air Cargo Association to transform Riyadh into a regional and global logistics hub.	<ul style="list-style-type: none"> Special Economic Zone within airport AI powered supply chain logistics

Developments proposed under Vision 2030



Other major targets under Vision 2030

- 60%** Private sector contribution target in KSA, increasing from 45% in 2016.
- 88** USD billion in non-oil exports targeted from KSA, increasing from SAR 185 billion in 2016.
- 30%** Share of renewable energy in KSA's current energy mix.

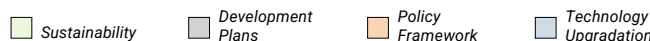
National Hydrogen Strategy

- 1.2 MT** Production of Green Hydrogen catering to 10% global demand by 2030
- USD 5 billion** Investment in Green hydrogen-based ammonia production facility in NEOM, a JV between SAPIF, Power, and Air Products.

Project Transcendence

- USD 99.8 billion** The Saudi Public Investment Fund (PIF) is anticipated to partner with Alphabet Inc
- 12%** Expected contribution of AI to Saudi Arabia's GDP by 2030 is 12%. AI market projected to grow at 29% CAGR

Themes	Highlights	Details	Investment Opportunities Within
04 Urban Mobility	AI in Urban Transportation	The Riyadh Metro project features the world's largest driverless public transit system.	<ul style="list-style-type: none"> Automation in metro-bus transit network Rolling Stock Maintenance
	Hydrogen (H ₂) Powered Taxis	Launch of a trial H ₂ taxis, set to become the world's largest hydrogen exporter by 2030.	<ul style="list-style-type: none"> Manufacture of H₂ powered vehicles Green H₂ production facilities, storage and distribution network
05 Logistics and Warehousing	Establishment of Grade A Logistics Facilities	GFH and GWC in partnership aim to establish 200,000 sq.m. facilities across major Riyadh, Jeddah, and Dammam.	<ul style="list-style-type: none"> Warehouse Automation Automated Guided Fleet Management
	Establishment of Kingdom's largest Logistics Park in Jeddah Islamic Port	DP World, with Mawani, is developing a 415,000 sq.m. facility with warehousing and a multi-purpose storage yard.	<ul style="list-style-type: none"> Solar-powered logistic facility Temperature-controlled storage, EXIM services.



ASCELA's View

Aligning with the ambitious goals of Vision 2030, Saudi Arabia introduced Riyadh Metro project, starts the trial of hydrogen taxis, and build upon multiple partnership unlocking diverse investment opportunities across transport and sustainability sectors.

04 Sectoral Developments in Bahrain

Themes	Highlights	Details	Investment Opportunities Within
01 Ports/ Shipping	Investment in Renewable Energy	With USD 10 million investment in solar power Khalifa Bin Salman Port will be the region's first fully renewable-powered port.	<ul style="list-style-type: none"> Focus on renewable energy-powered transportation Expansion of maritime infrastructure
	Ship Recycling	Kingdom of Bahrain has signed MoU with Maersk to develop a ship recycling and green steel ecosystem in Bahrain.	<ul style="list-style-type: none"> Ship recycling Infrastructure
02 Railways	King Hamad Causeway	The project will link Bahrain and Saudi Arabia with a parallel bridge to the King Fahd Causeway, featuring four vehicle lanes, two railway tracks, and a 57 Km rail line.	<ul style="list-style-type: none"> Cross Border Trade Facilitation Development of real estate and logistics hub
03 Aviation	Airport Modernisation Programme	Partnership with Leonardo Industrial Group for modernising air navigation systems. Identification of an offshore plot to develop a greenfield terminal.	<ul style="list-style-type: none"> International tourism and transit AI – Powered aviation systems
	Express Cargo Village	With the addition of warehouses, runway aprons, and other infrastructure, BAH will be able to increase its cargo-carrying capacity.	<ul style="list-style-type: none"> Air Freight Operations Smart Cargo Hub

Themes	Highlights	Details	Investment Opportunities Within
04 Urban Mobility	New Digital City to set smart urban environment in Bahrain	380,000 sq.m. project establishing standards for smart urban environments, environmentally friendly infrastructure etc. The construction will be led by Edamah in 2025.	<ul style="list-style-type: none"> A broad spectrum of real estate possibilities Commercial spaces and residential properties, all integrated by a smart ecosystem. Sustainable Investment
	Digitalisation of 15 Traffic Services	Applications for driving learner's licenses, paying traffic fines, and scheduling driving tests are some of the recently made available online services.	<ul style="list-style-type: none"> Digital Transformation Solutions Service Delivery
05 Logistics and Warehousing	USD 218 Million logistics hub expansion in Bahrain	Inauguration of 54,000 sq.m. new facility accommodating 12 DHL aircraft and 2 Million shipments annually.	<ul style="list-style-type: none"> Leading regional logistics gateway
	AJEX to boost logistics presence in Bahrain	Bahrain Airport and AJEX, have inked a LOI to build a logistics facility at Bahrain Cargo Village.	<ul style="list-style-type: none"> Automation in freight operations

■ Sustainability
 ■ Development Plans
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 ■ Technology Upgradation

Strategic Investments in Port Infrastructure, Digital Cities, and Logistics Hubs is Redefining Bahrain's Future

ASCELA's View

By prioritizing green initiatives and digital transformation, Bahrain is shaping a sustainable future with projects like a fully renewable energy-powered port and a state-of-the-art digital city. These groundbreaking efforts position Bahrain as a leader in sustainability, demonstrating its commitment to eco-friendly innovation and visionary urban development.

06 Sectoral Developments in Qatar



	Themes	Highlights	Details	Investment Opportunities Within
01	Ports/ Shipping	Global Maritime Services Hub	USD 21.9 million Yachts and Shipyard to be developed at Qatar's Marsa Free Zones Maritime Development Port by Milaha and QFZ.	<ul style="list-style-type: none"> • Boost in R&M Market. • Yacht Tourism • Infrastructure Development
		QatarEnergy's Shipbuilding Endeavour	QatarEnergy's ambitious LNG fleet expansion programme launches four new state-of-the-art vessels from South Korea.	<ul style="list-style-type: none"> • Shipbuilding and Maritime Technology • LNG Supply Chain
02	Railways	Regional Connectivity Initiative to unify GCC Countries	2,177 Km Gulf Railway to connect all six GCC countries in Eastern Arabia by 2030 taking a significant step towards regional integration and sustainable transportation.	<ul style="list-style-type: none"> • Boost trade and logistics operations • Rail technology development
03	Aviation	Launch of the World's First Starlink-Equipped Boeing 777	Qatar Airways bridging the gap between skies and ground by bringing advanced technology via Starlink-equipped 777 aircraft from Doha to London.	<ul style="list-style-type: none"> • Upgradation of passenger experiences. • Investments in R&D • Manufacturing of advanced hardware and software support
		Strengthening Global Connectivity via air transport	Qatar Civil Aviation Authority (QCAA) signing MOU and service agreements with countries to expand transport rights.	<ul style="list-style-type: none"> • Infrastructure Development • Growth in Tourism, international trade etc.

■ Sustainability
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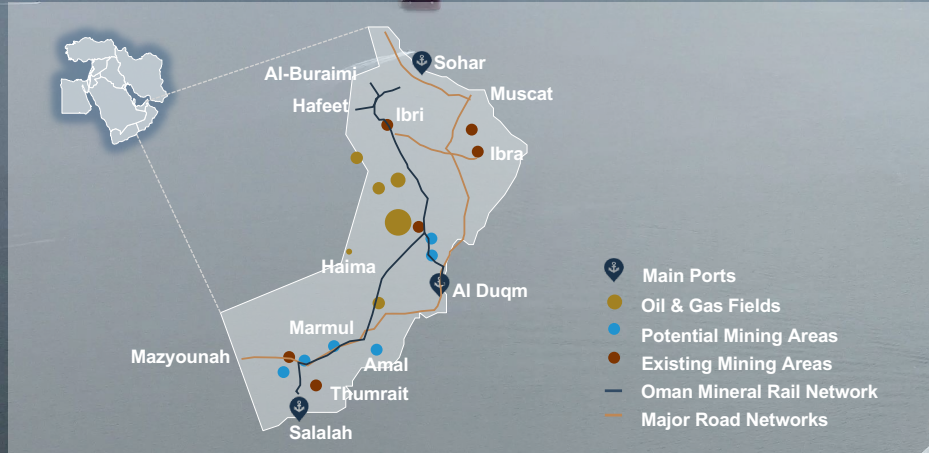
	Themes	Highlights	Details	Investment Opportunities Within
04	Urban Mobility	AI in Urban Transportation	New ABB state-of-the-art E-mobility facility with Qatar Free Zones Authority (QFZ) in Umm Alhoul Free Zone fostering a dynamic sustainable ecosystem.	<ul style="list-style-type: none"> • EV Charging and smart grid systems • Clean Tech Manufacturing • Green Innovation
		E-Mobility Forum	New autonomous e-mobility forum inaugurated to emphasise the nation's commitment and to keep up with global advancements.	<ul style="list-style-type: none"> • Eco-friendly transport projects • Strategic partnerships
05	Logistics and Warehousing	Qatar Freight Master Plan (QFMP)	Strategic ground freight system to position Qatar as a global logistics hub and achieve Qatar National Vision 2030.	<ul style="list-style-type: none"> • New freight terminals • Regional trade expansion
		Reshaping Offshore Logistics Landscape	Cargostore Worldwide and HALEYS Group Middle East partner to revolutionise offshore logistics.	<ul style="list-style-type: none"> • Logistics Infrastructure • Energy Sector Expansion • Offshore Shipping

ASCELA's View

The GCC Railway, connecting all six GCC countries, represents a transformative milestone, driving investments and aligning with Qatar's strategic initiatives like the Ground Freight Master Plan. Qatar has further cemented its status as a global leader with the launch of the world's first Starlink-equipped Boeing 777. In the maritime sector, Qatar is advancing its presence in repair and maintenance (R&M) by developing yachts and shipyards, underscoring its commitment to industry excellence.

07 Sectoral Developments in Oman

Snapshot of Key Regions Under Development in Oman



“Prioritising Logistics Cities and Rail Integration to bolster Regional Trade”



OMAN Source: ASCELA's Analysis

Themes	Highlights	Details	Investment Opportunities Within
01 Ports/ Shipping	Alliance to Decarbonise	Sohar Port and Freezone sign alliance to promote decarbonisation of industrial value chains aligning with Oman's net zero future vision. Also, development of polysilicon facility has commenced.	<ul style="list-style-type: none"> Renewable energy supply chain R&D Partnerships Global solar markets Green finance and carbon credits
	Fuel Tanks	Shina Port to develop large-scale fuel storage tank facilities to enhance port capabilities and attract commercial activities.	<ul style="list-style-type: none"> Energy storage infrastructure Downstream services expansion Logistics and Port operations
02 Railways	Hafeet Rail Project	The implementation phase of the railway network connecting Sohar Port and UAE has begun, catalysing of various sector cooperations.	<ul style="list-style-type: none"> Tourism and trade boost Logistics Infrastructure Real estate development
03 Aviation	Air Transport Partnerships	Oman's Civil Aviation Authority (CAA) has formalised air bilateral agreements with six nations, boosting international connectivity with mutual cooperations.	<ul style="list-style-type: none"> Aviation Infrastructure Cargo handling facilities Aerospace services Tourism and trade promotion

Themes	Highlights	Details	Investment Opportunities Within
04 Urban Mobility	Road Infrastructure Development	Facilitating smoother transportation with 7 key road infrastructure projects in Oman valued at USD 309. Also, a new transport hub at Nizwa is set to improve mobility.	<ul style="list-style-type: none"> Construction and engineering Freight, cargo, and transport Tourism and Hospitality Real Estate
05 Logistics and Warehousing	New Logistics Hub by Flag Logistics (GWC)	State-of-the-art logistics hub at Khazaen Economic City, will mark the connectivity of powerhouse locations across region.	<ul style="list-style-type: none"> Distribution Networks Transport and infrastructure Retail and last mile delivery
	Launch of New Guide for Warehouse Standards	Oman introduces the “Unified Guide for Warehouse Standards and Requirements” for streamlining operations.	<ul style="list-style-type: none"> Modernisation of warehouses Warehouse management solutions

Sustainability
 Development Plans
 Policy Framework
 Technology Upgradation

ASCELA's View

Oman's Net Zero Vision is catalyzing transformative projects and attracting investments in decarbonization and sustainability. The upcoming Hafeet Rail Project is poised to be a game-changer, enhancing connectivity and unlocking economic opportunities in the years ahead. Adopting a holistic approach, Oman is driving progress across sectors with the establishment of warehousing standards, expansion of logistics and transport hubs, and modernization of road infrastructure.

08 Sectoral Developments in Kuwait

Focusing on business environment development, transparency, and labor market reforms to drive private sector growth, the Kuwaiti economy is predicted to grow by 2.6% in 2025. (IMF)

Themes	Highlights	Details	Investment Opportunities Within
01 Ports/ Shipping	EDGE to enhance Kuwait's marine assets	Strategic contract awarded to EDGE to modernise and upgrade Kuwait's marine assets.	<ul style="list-style-type: none"> Procurement of AI marine fleet Maintenance Support Training programmes
	Strategic Investment for Mubarak Al Kabera Port	Ministry of Public Works to be awarded USD 604 million for the completion of the port in 2024-25 to transform it into a transit trade hub.	<ul style="list-style-type: none"> Port Operations International Trade opportunities
02 Railways	Kuwait-Saudi Railway	Infrastructure project set to stretch 650 Km and connect Kuwait City with Riyadh by 2028. The new railway will drastically reduce travel time from over 10 hours to just 2 hours.	<ul style="list-style-type: none"> Creation of new industrial zones and FTA Green transport solutions
03 Aviation	Airport Terminal T2 in Kuwait	Elevating Kuwait's aviation capabilities with cutting-edge technology-equipped airport to be opened within two years.	<ul style="list-style-type: none"> Ground handling, maintenance, and passenger services Tourism and Trade Retail and Commercial E-commerce growth
	Air Cargo City at Kuwait International Airport	Aimed to design and develop facilities for cargo handling, storage, and distribution services by providing designing shipping, rail support services etc.	<ul style="list-style-type: none"> Shipping buildings Value – added- logistics services
04 Urban Mobility	Increased Vehicle Limits for Delivery Services	The vehicle limit per license has been doubled from 45 to 90 vehicles, allowing businesses to expand their delivery fleets.	<ul style="list-style-type: none"> Automation in last-mile delivery Smart Fleet Solutions
05 Logistics and Warehousing	Construction begins for logistics city	Work has commenced for the USD 660 Million logistics city project at Shuwaikh Port to expand maritime trade.	<ul style="list-style-type: none"> Construction sector opportunities Automation Port Commercial Activities

■ Sustainability
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ASCELA's View

Kuwait is making notable progress in boosting its trade and cargo capabilities through airport expansions and the development of an Air Cargo City and Logistics City. The maritime sector is also undergoing significant modernization with substantial infrastructure investments. However, urban mobility seems to be receiving relatively less emphasis in investment priorities.

NEW KUWAIT 2035

Key Development Goals, and Focus Areas

Transforming Kuwait Into a Diversified, Sustainable Economy With a Robust Infrastructure and Innovative Sector.

USD 35 Billion p.a.

SEZ GDP



Private Global Economic Region



Trade Hub



15-20M Passengers



Financial Hub



Human Resource Development



Privatisation

USD 2 Billion p.a.

Attracted FDI



Enabling **Govt. Institutions**



8-9M tons **Cargo**



Navigating Investments across Potential Sectors in 2025

09 Investment Opportunities

MENA Region Investability Index 2025: Sector Scoring

Investment opportunities have been explored under the following headings across different sectors for MENA:

- **Sustainability** – Focuses on Sustainable developments and Initiatives.
- **Development Plans** – Focuses on development initiatives, expansion plans, major mergers and collaborative partnerships.
- **Policy/Regulatory Framework** – Focuses on regulatory framework and identifying policy enhancements or incentives.
- **Technology Upgradation** – Focuses on innovative technological advancements.

Further, the average of indexes across all sectors is then taken as the Investability Index for the country. Sector scoring is depicted in the scoring chart below.

	Ports/ Shipping	Railways	Aviation	Urban Mobility	Logistics/ Warehousing	Investability
UAE	High	High	High	High	High	High
SAUDI ARABIA	High	Fairly High	Fairly High	High	High	High
BAHRAIN	High	Moderate	Fairly High	High	High	Moderate
EGYPT	Fairly High	Moderate	High	Fairly High	High	Moderate
QATAR	High	Fairly High	High	Fairly High	High	Fairly High
OMAN	High	High	Moderate	Fairly High	High	Fairly High
KUWAIT	High	Fairly High	Fairly High	Fairly Low	High	Moderate

■ Low
 ■ Fairly Low
 ■ Moderate
 ■ Fairly High
 ■ High

Investability Index for MENA Region – Year 2025

	Low	Fairly Low	Moderate	Fairly High	High
Sustainability					
Development Plans					
Policy/ Regulatory					
Technology Upgradation					
Ports/ Shipping					Innovative Technology Integration
Railways					Connecting the Middle East through Rail Project
Aviation					Alternative Fuels
Urban Mobility					Policy Reforms and Partnerships
Logistics/ Warehousing					Requires greater focus on sustainability

ASCELA's View

Positive Outlook

Following an extensive assessment of the MENA countries across five key sectors, ASCELA's analysis highlights substantial opportunities, particularly in the UAE and Saudi Arabia, driven by technological advancements and sustainability initiatives. Promising prospects have also been identified in key sectors in Qatar and Oman, showcasing notable potential for growth and development.

About ASCELA

ASCELA is a professional service company providing advisory services to organisations to help them enhance efficiency by analysing market potential, competitive landscape, and operational, financial, economic, technical, and strategic challenges into Infrastructure and build environments.

About ASCELA Strategic Advisory – Mobility and Supply Chain

ASCELA's Strategic Advisory – Mobility and Supply Chain practice helps clients develop and leverage core competencies to deliver sustainable and tangible returns. We define strategies that help clients gain market share, enter new markets, regions, and products, improve the bottom line and reconfigure organisational/operational structures.

ASCELA is well placed to provide strategic inputs and analysis for assessing potential development opportunities in Infrastructure design and development space. Our in-depth knowledge of our focus transportation sectors, backed by intensive research and analysis of our client's specific contexts, helps define superior strategies, frameworks, and implementable action plans.

United Arab Emirates

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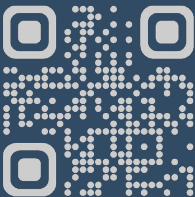
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