

INSTRUMENT MANIFOLD, TUBING and FITTINGS

INVESTMENT OPPORTUNITY SCORECARD

INDUSTRIAL EQUIPMENT

AUGUST 2021

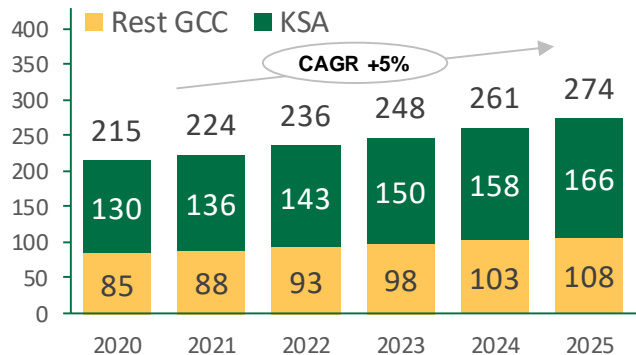


INSTRUMENT MANIFOLD, TUBING and FITTINGS

OPPORTUNITY'S DESCRIPTION: Establish a manufacturing unit of Instrument Manifold, Tubing and Fittings.

DEMAND

MARKET SIZE, \$ MM



INVESTMENT HIGHLIGHTS

- Establish a factory to manufacture components including: a. Tubing. b. Fitting. c. manifold .
- Small Medium Size Enterprise: SMEs to manufacture support components such as a. cover cap. b. Packaging.
- Establish technical support service center to serve the following requirements: a. Technical consultation. b. Spare parts. c. Maintenance and troubleshooting. d. Testing and Certification.
- Design by centralized team in KSA.

INVESTMENT OVERVIEW

VALUE PROPOSITION

- Instrument Manifold, Tubing and Fittings represents an attractive localization opportunity given the current supply gap and expected demand growth.
- Currently, most of KSA demand of Instrument Manifold, Tubing and Fittings is imported.
- Instrument Manifold, Tubing and Fittings demand is driven by Oil and Gas Industry.
- Instrument Manifold, Tubing and Fittings demand for GCC will support demand growth.
- Attractive cost base including low logistics, land, utilities, and labor costs.

KEY DEMAND DRIVERS

- KSA demand for Instrument Manifold, Tubing and Fittings was estimated at 124 Millions USD in 2019.
- Instrument Manifold, Tubing and Fittings demand is expected to rise 5% annually and reach 166 Millions USD by 2025
- Forecasted at 5% annual growth and estimated to reach 274 Millions USD for GCC by 2025.

MARKET OVERVIEW

COMPETITOR ANALYSIS



**Non exhaustive list*

GLOBAL TRENDS

- Increasing demand for automation across many segment and processes will drive the overall demand for instrument manifold, tubing and fittings

DEFINITIONS

#	SCORECARD SECTION	DEFINITIONS
1	Market size	Size of market in value/volume in KSA and/or Region (MENA/GCC) covering future projections based on available estimates from published /government sources
2	Demand drivers	A select number of factors that will influence future demand for the related product/service
3	Investment highlights	An overview of key financial metrics summarizing the investment opportunity along with the expected return based on the suggested investment size
4	Value proposition	Summary of key differentiators that position KSA as a strategic choice over other regional/global peers
5	Market readiness	An overview of KSA market structure, market maturity and level of participation by local and global players
6	Competitor analysis	List of the local & international players manufacturing the underlying product in Saudi Arabia and their market share
7	Global trends	Latest business developments within the sector/product category
8	Scalability and localization	Ease of scaling the business across the value chain or into new adjacent products or geographies that would maximize the opportunity's investment returns and the ability and potential to locally manufacture the product and its components
9	Import dependency	An overview of the countries from which Saudi Arabia is importing the product and their value/volume and share in total imports
10	Value chain analysis	The process or activities that would potentially need to be carried out to deliver the underlying product or service
11	Key stakeholders	Government institutions, organizations, and/or authorities that participate or influence the market for the underlying product/service
12	Enablers	Factors that enable investment in the underlying opportunity
13	Cost of doing business in KSA	Key factors that position KSA as a competitive destination for investment in the region. Productivity adjusted wages do not include cost of \$1.23/hour towards annual recurring charges including work permit, resident identity (iqama) and health insurance

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