



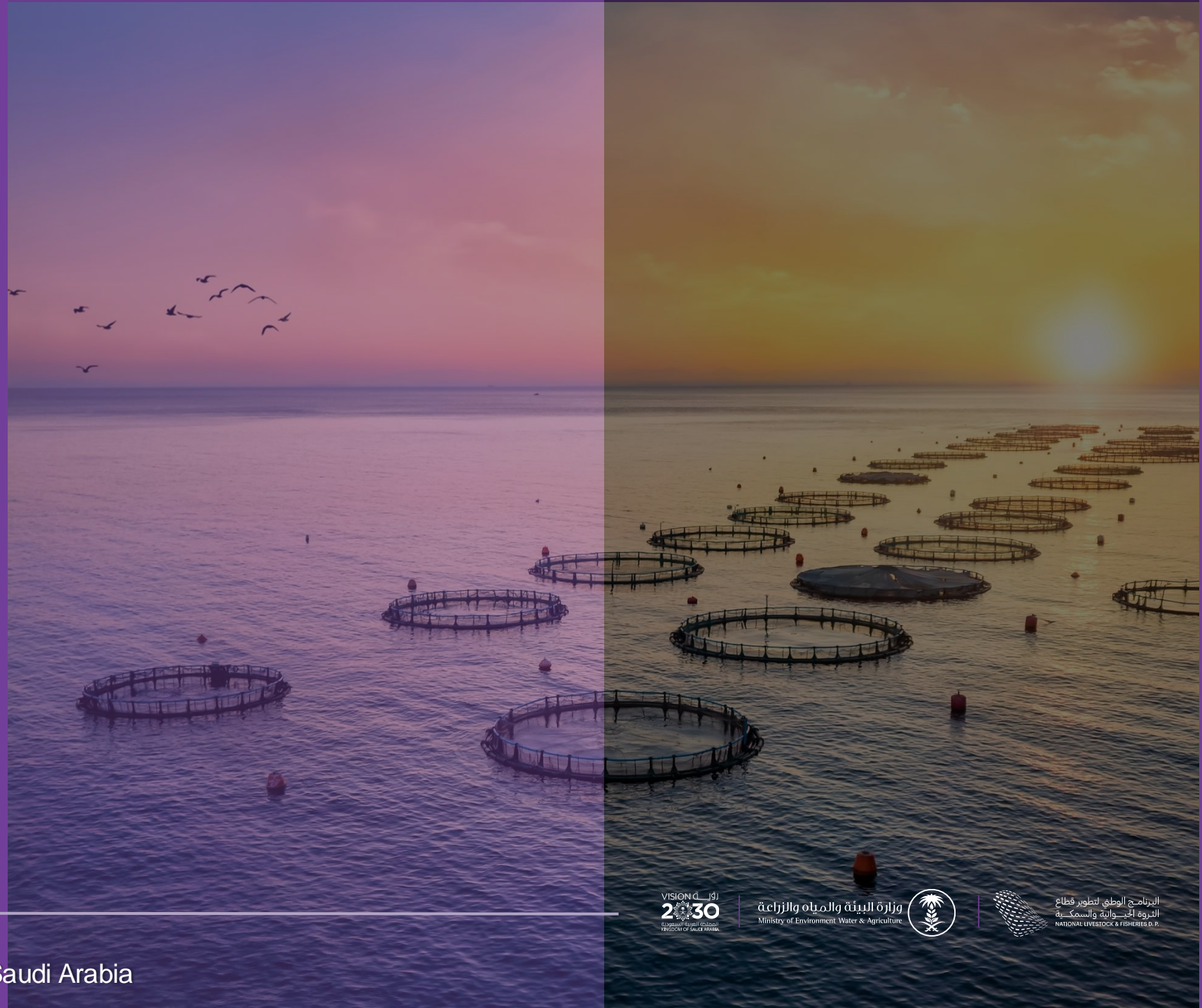
Status of the seafood industry and investment opportunities in the Kingdom of Saudi Arabia

Philippos Papageorgiou
VP of Operations
NLFDP



01

Current Industry Status



Status of the seafood industry and investment opportunities in the Kingdom of Saudi Arabia



وزارة البيئة والمياه والزراعة
Ministry of Environment, Water & Agriculture



البرنامج الوطني لتطوير قطاع
الثروة الحيوانية والسمكية
NATIONAL LIVESTOCK & FISHERIES D.P.

Significant Investment in Infrastructure & Know-how / Shrimp farming



White Shrimp
Litopenaeus vannamei



Significant Investment in Infrastructure & Know-how / Marine fish farming



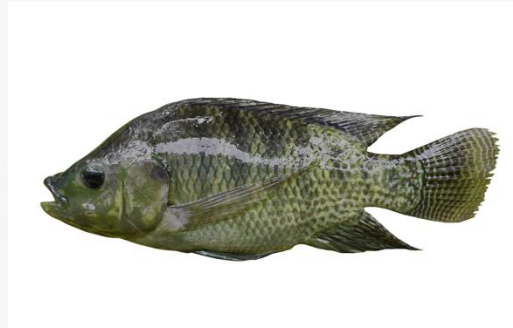
Asian Seabass
Lates calcarifer



Sobaity
Sparidentex hasta



Mediterranean Seabream
Sparus aurata



Marine Tilapia
Oreochromis spilurus



Significant Investment in Infrastructure & Know-how / Fresh water fish farming



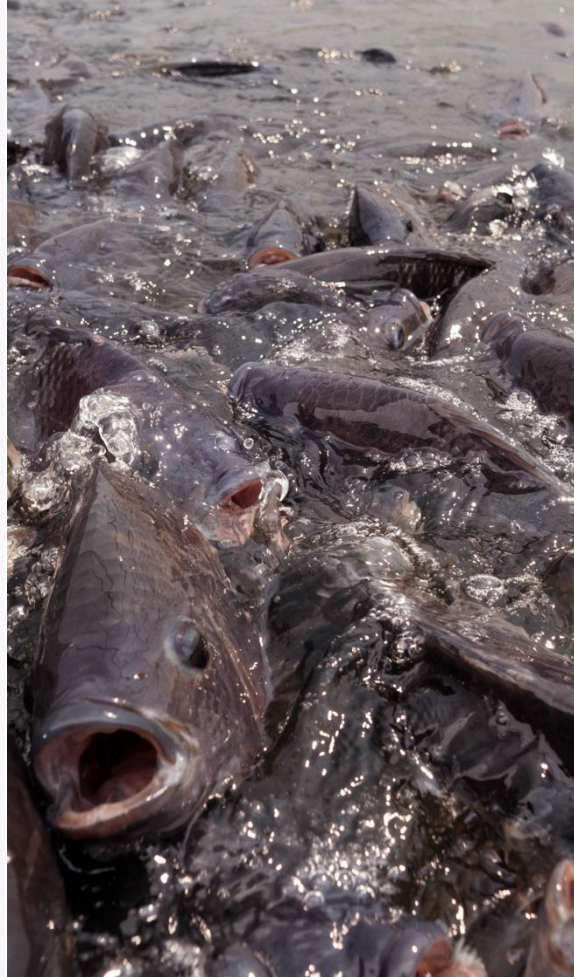
Tilapia

Oreochromis niloticus



Salmon trout

Oncorhynchus mykiss



Significant Investment in Infrastructure & Know-how / RAS or Aquaponics



Significant Investment in Infrastructure & Know-how / High food-hygiene standards



Significant Investment in Infrastructure & Know-how / Aqua feed mills



إنتاج السمك المصنوع من الأعلاف المائية
 ترخيص صناعي رقم: 248 / من تاريخ 1-3-1421
 ص ب: 20، الليث - 21961 مملكة العربية السعودية

NAQUA Fish Feed Specifications

	35% CP	38% CP	52% CP
Feed Type	2.2mm, 3mm, 4mm, 5mm, 6mm, 8mm		
Pellet Diameter	45.0 min	48.0 min	53.0 min
Crude Protein %	13.0 min	13.0 min	13.0 min
Crude Fat %	3.0 max	3.0 max	3.0 max
Crude Ash %	18.0 min	17.0 min	13.0 min
Crude Fiber %			
Carbohydrates (NFE) %	4293	4440	4960
Gross Energy (Kcal/kg)	3769	3919	4960
Digestible Energy (Kcal/kg)			
Shelf Life:	Six months from the date of production, store in sheltered warehouse at room temperature and do not expose to direct sunlight or rain.		
Storage Standards:			
Ingredients:	Fish meal, Soybean meal, Wheat/Barley, Fish Oil, Soya Lecithin, Vitamin's, Mineral premixes, Anti-oxidant, Mold inhibitors and Amino acids.		
Quality Assurance & Certifications:	NAQUA Feed production processes are certified with three tier quality assurance programs and certified with ISO 9001:2008 QMS, ISO 14001:2004 EMS, ISO 22000:2005 FSHS and HACCP.		

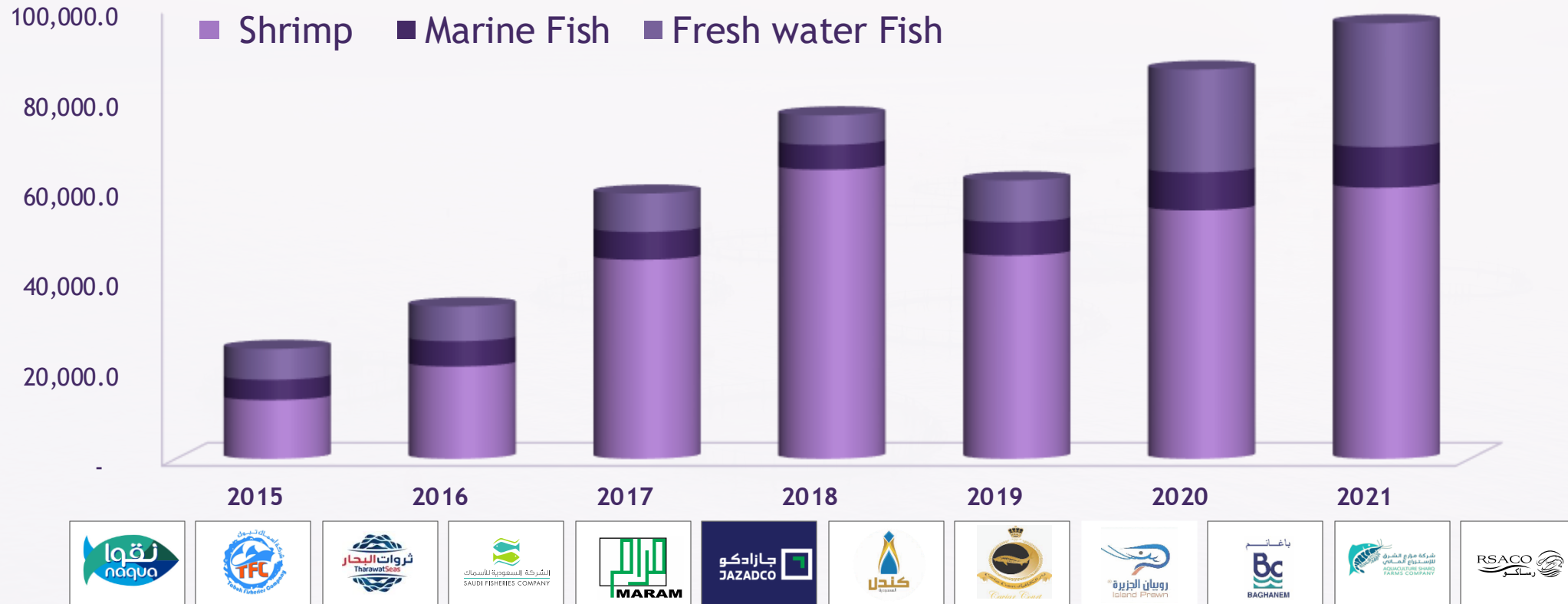
NET WT.: 25 KG وزن الصب: 25 كجم



Supporting industries

Current Production

From 2015 to 2018, total aquaculture production increased by 200%, from around 25 thousand tons to almost 75 thousand tons, and in 2021 surpassed 100 thousand tons



Strong Exports

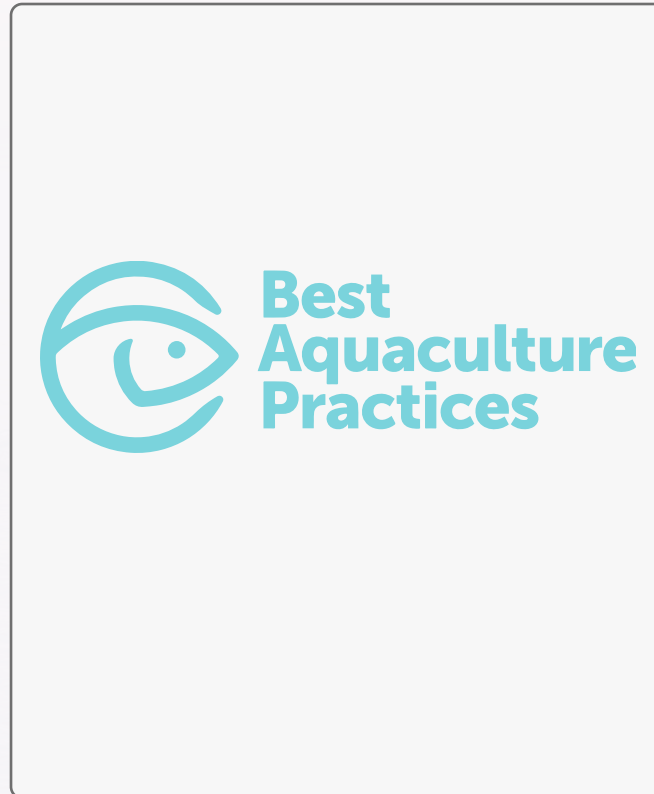


3 Process and product quality drivers

NATIONAL BIOSECURITY PROGRAM



INTERNATIONAL CERTIFICATION GSA/BAP

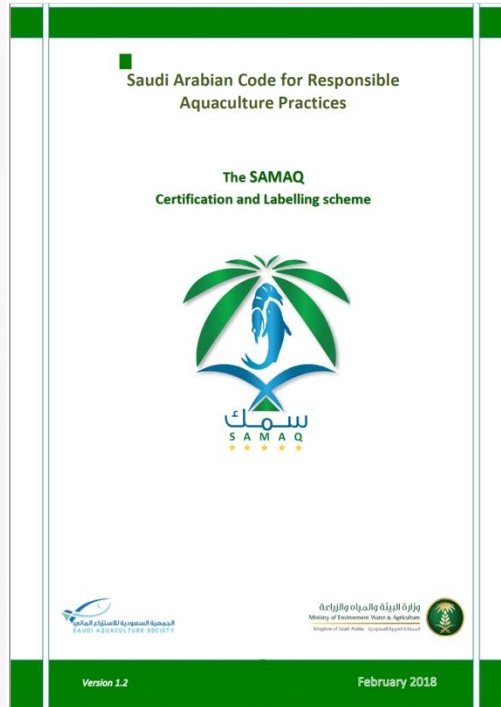


NATIONAL CERTIFICATION SAMAQ



3 Process and product quality drivers

NATIONAL CERTIFICATION SAMAQ



Saudi Arabian Code for Responsible Aquaculture Practices

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Saudi Arabian Code for Responsible Aquaculture Practices

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Local product awareness increase and market development

SAMAQ B2C Labelling



Local product awareness increase and market development

All national aquaculture products marketed under SAMAQ, indicating their local origin and assuring of their freshness and product safety

More local seafood consumption

Health Benefits of eating seafood

Seafood (fish, crustaceans, mollusks etc.) is an excellent source of protein and it also provides a broad range of important nutrients for the human health.

According to nutritional experts, for a healthy lifestyle, seafood must be consumed at least 2 times per week.

Did you know?

Aquaculture already provides half of the seafood (marine and freshwater organisms) consumed globally and has grown faster than any other form of food production.

Aquaculture in Saudi Arabia is a dynamically emerging food producing sector.

The clean waters and favorable climatic conditions of Saudi Arabia provide the best environment for healthy fish and shrimp farming.

Under strict guidance and control by the Government, the prime goal of the aquaculture producers is to provide the most fresh, safe and nutritious seafood products to the saudi consumers.

SAMAQ is the Saudi national aquaculture product certification and labeling program. Developed by Saudi Aquaculture Society under the guidance of the Ministry of Environment, Water and Agriculture.

Always fresh / **دائما طازج**

BECAUSE You Care / لأنك تهتم

طازج من البحر الأحمر / Your Plate 60 - 70 g

Always fresh / دائما طازج

Certified By VISION 2030 / معتمد من قبل رؤية 2030

Approved By / معتمد من قبل

خيارك للمنتجات البحرية المحلية الخاضعة للمعايير العالمية لممارسات الاستزراع المائي

YOUR choice of local seafood, certified under the highest international standards for responsible aquaculture practices

BECAUSE You Care / لأنك تهتم

طازجة من بحارنا مباشرة / Fresh Direct From OUR Sea

Certified By VISION 2030 / معتمد من قبل رؤية 2030

Approved By / معتمد من قبل

خيارك للمنتجات البحرية المحلية الخاضعة للمعايير العالمية لممارسات الاستزراع المائي

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BECAUSE You Care / لأنك تهتم

Assuring Quality & Freshness / نضمن لك الجودة والطازجة

Certified By VISION 2030 / معتمد من قبل رؤية 2030

Approved By / معتمد من قبل

خيارك للمنتجات البحرية المحلية الخاضعة للمعايير العالمية لممارسات الاستزراع المائي

YOUR choice of local seafood, certified under the highest international standards for responsible aquaculture practices

Extensive R&D on new native species with high market potential



Disease prevention



Genomics



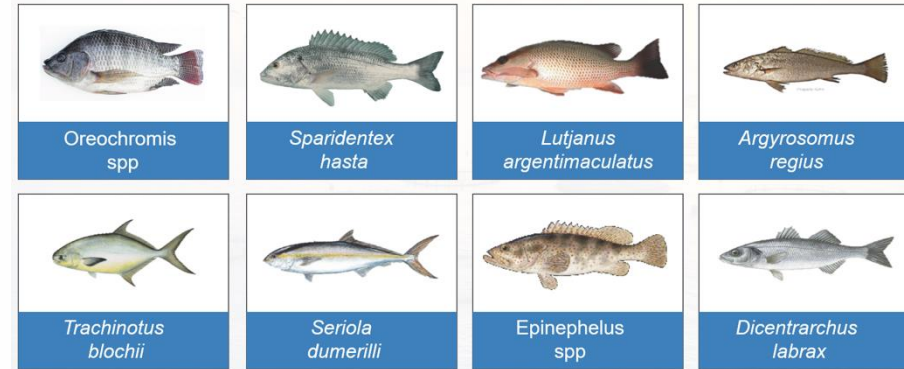
Growth rate B-FCR



Survival E-FCR

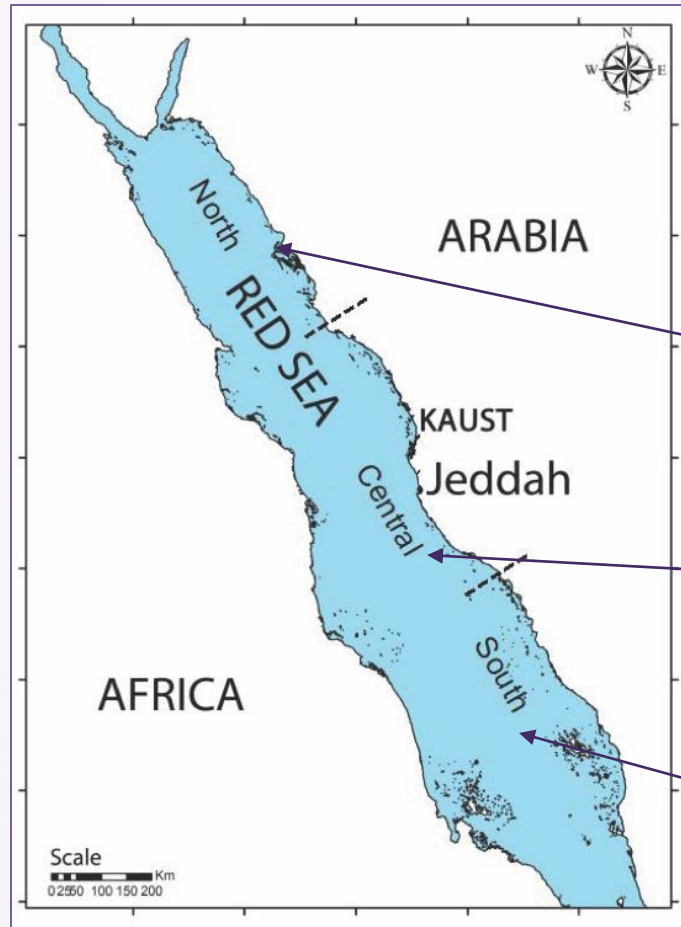


Nutrition



Extensive R&D on new native species with high market potential

Species most suitable for aquaculture in the Red Sea



North RS



Central RS



South RS



Regional Aquaculture Center of Excellence

Key Differentiators



Largest Center with the most comprehensive aquaculture R&D and aquatic animal health offering in the Red Sea and in the region



Extensive focus on developing and promoting local and regional species



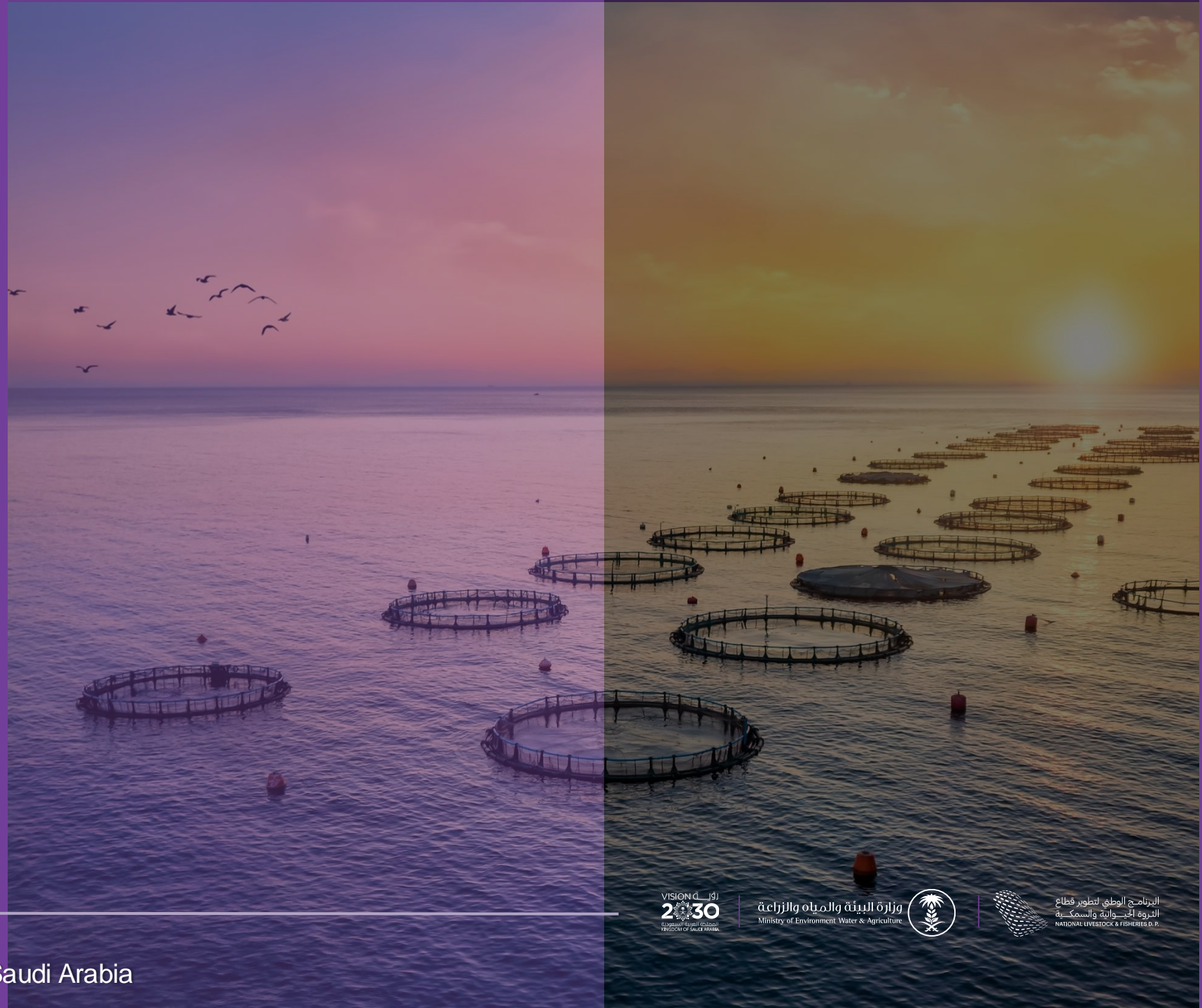
Dedicated programs to develop local and regional capabilities across all aquaculture activities



Environmentally sustainable through renewable energy usage, extensive water treatment, and mangrove plantation

02

National Aquaculture Strategy



Status of the seafood industry and investment opportunities in the Kingdom of Saudi Arabia



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Ministry of Environment, Water & Agriculture



البرنامج الوطني لتطوير قطاع
الثروة الحيوانية والسمكية
NATIONAL LIVESTOCK & FISHERIES D.P.



فيما يخصص الموارد الغذائية، سنواصل بناء مخزونات استراتيجية بمستويات آمنة وكافية لمعالجة الحالات الطارئة، كما سنبنّي شراكات زراعية استراتيجية مع الدول التي حباها الله موارد طبيعية من تربة خصبة ومياه وفيرة بما يحمي مواردنا المائية، وسنرشد استخدام المياه في المجال الزراعي بإعطاء الأولوية للمناطق الزراعية التي تمتلك مصادر مياه طبيعية ومتجددة. **وسنركز جهودنا في دعم الاستزراع السمكي**، كما سنعمل مع المستهلكين ومصنعي الأغذية والتجار لتقليل من كميات الهدر.

بِسْمِ اللَّهِ الرَّحْمَنِ الرَّحِيمِ
لِللَّهُ سُبْحَانَ الْعَرْشِ الْمُسْتَعِزَّ
عَلَى كُلِّ ذِي عِلْمٍ

“هدفي الأول أن تكون بلادنا نموذجًا ناجحًا ورائدًا في العالم على كافة الأصعدة وسأعمل معكم على تحقيق ذلك”

Aquaculture Sector Aspirations

Vision 2030 has set ambitious aquaculture sector targets to improve sector competitiveness and increase seafood production & consumption

Global competitiveness



Vision

As part of a larger drive to further develop the Saudi non-oil economic growth under Vision 2030, MEWA has set a strategic goal to develop a globally competitive aquaculture sector

AQUACULTURE SECTOR TARGETS FOR 2030



Increase local seafood consumption

100 %

Increase in seafood consumption per capita



Enhance food security

600K tons

Total seafood production



Reduce local production costs

-30%

Production costs reduction (economies of scale and improved efficiency)

1. Targets set by NIDLP investor attraction source : MEWA, Vision 2030, NIDLP

رؤية VISION 2030
المملكة العربية السعودية
KINGDOM OF SAUDI ARABIA

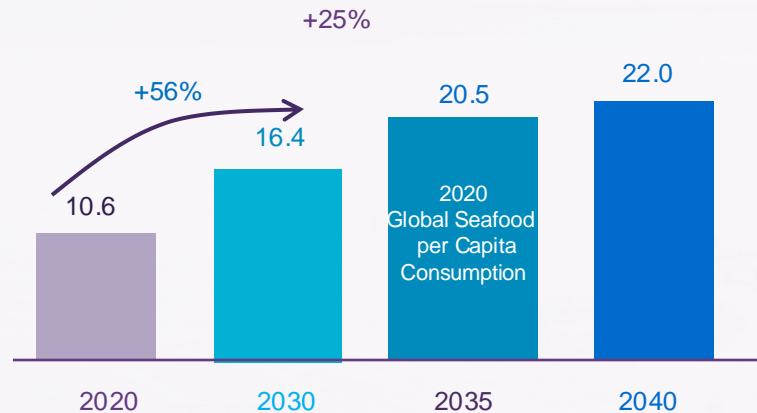
National Industrial Development & Logistics Program

National Transformation Program

National Aquaculture Development Strategic Plan

KSA seafood consumption has the potential to reach around ~ 900k MT by 2040 at par with global average

KSA Seafood consumption (2020-2040, Kg/Capita)



	2020	2030	2035	2040	2020 Global Seafood per Capita Consumption
Total KSA Seafood Consumption (MT '000)	354	648	847	911	~ 67.5 MT '000
Estimated KSA Population (Millions)	33.4	39.5	41.3	42.7	Estimated Capture Fisheries Production

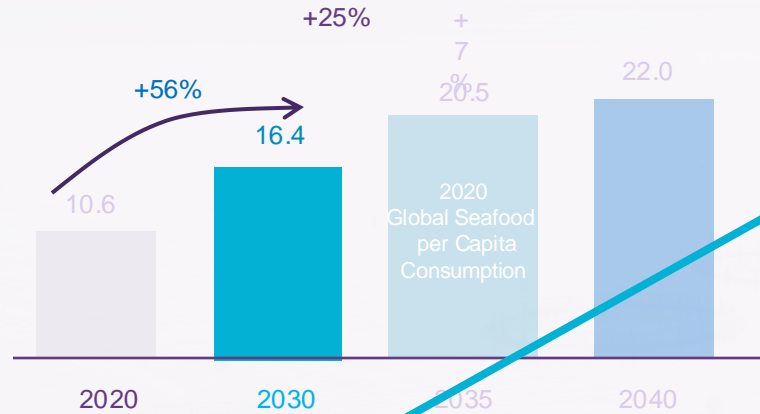
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- 2) exports not to be considered as these contracts are usually locked in the long-term and cannot be rescinded

Source: Euromonitor, EU Science Hub (2019 world average), GAST(population 2018), World Bank(population 2030 and 2040), OECD,FAO, Strategy& analysis

National Aquaculture Development Strategic Plan

KSA seafood consumption has the potential to reach around ~ 900k MT by 2040 at par with global average

KSA Seafood consumption (2020-2040, Kg/Capita)



Required 2030 KSA Aquaculture Production

648 MT '000

2030 KSA Seafood Consumption

~ 67.5 MT '000

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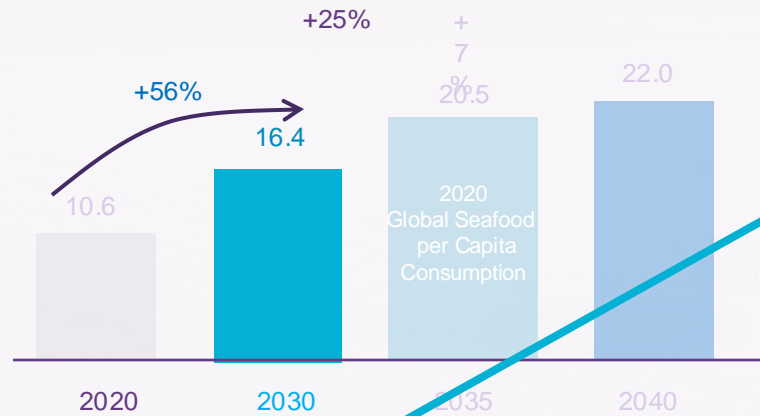
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National Aquaculture Development Strategic Plan

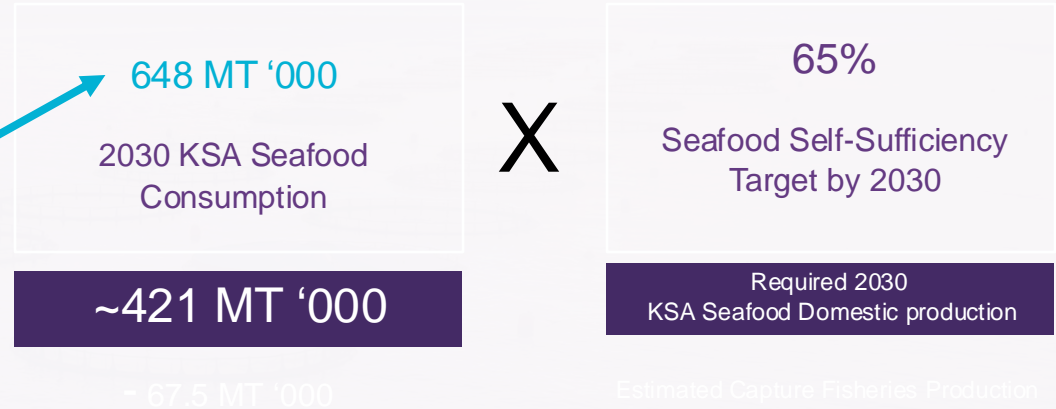
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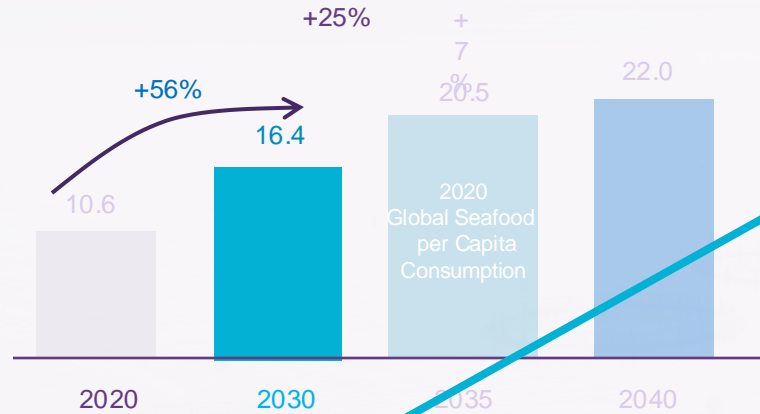
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National Aquaculture Development Strategic Plan

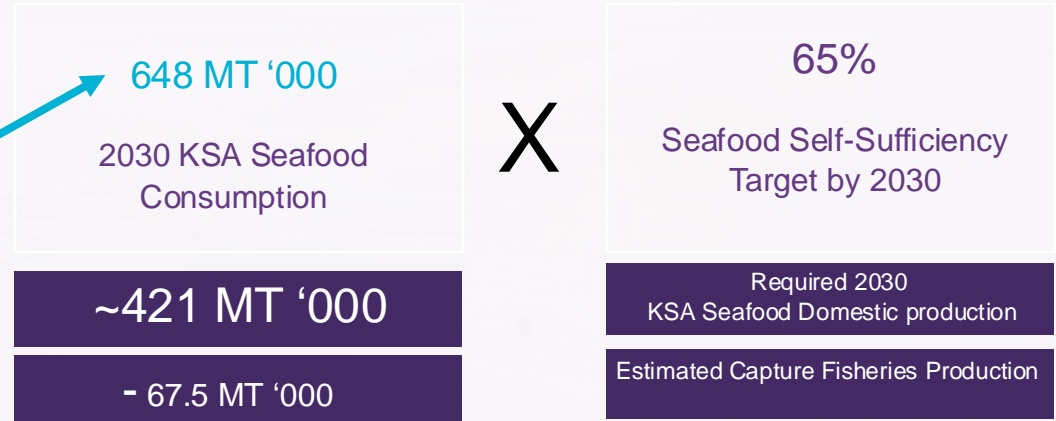
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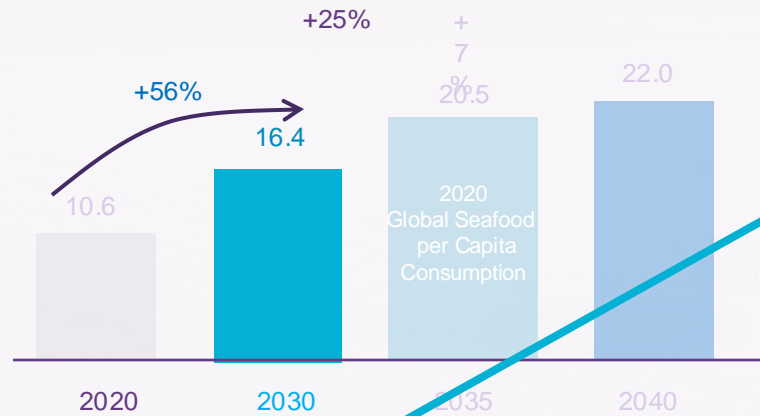
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Required 2030 KSA Aquaculture Production

648 MT '000

2030 KSA Seafood Consumption

X

65%

Seafood Self-Sufficiency Target by 2030

~421 MT '000

Required 2030 KSA Seafood Domestic production

- 67.5 MT '000

Estimated Capture Fisheries Production

~354 MT '000

Required 2030 aquaculture production (excluding exports²) to meet self-sufficiency objectives

- 1) Capture fisheries assumed to remain constant as per 2019 production numbers;
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National Aquaculture Development Strategic Plan

KSA seafood consumption has the potential to reach around ~ 900k MT by 2040 at par with global average



2023
106 Mill tourists

↓

2030
150 Mill tourists

Required 2030 KSA Aquaculture Production

648 MT '000

2030 KSA Seafood Consumption

X

65%

Seafood Self-Sufficiency Target by 2030

~421 MT '000

Required 2030 KSA Seafood Domestic production

- 67.5 MT '000

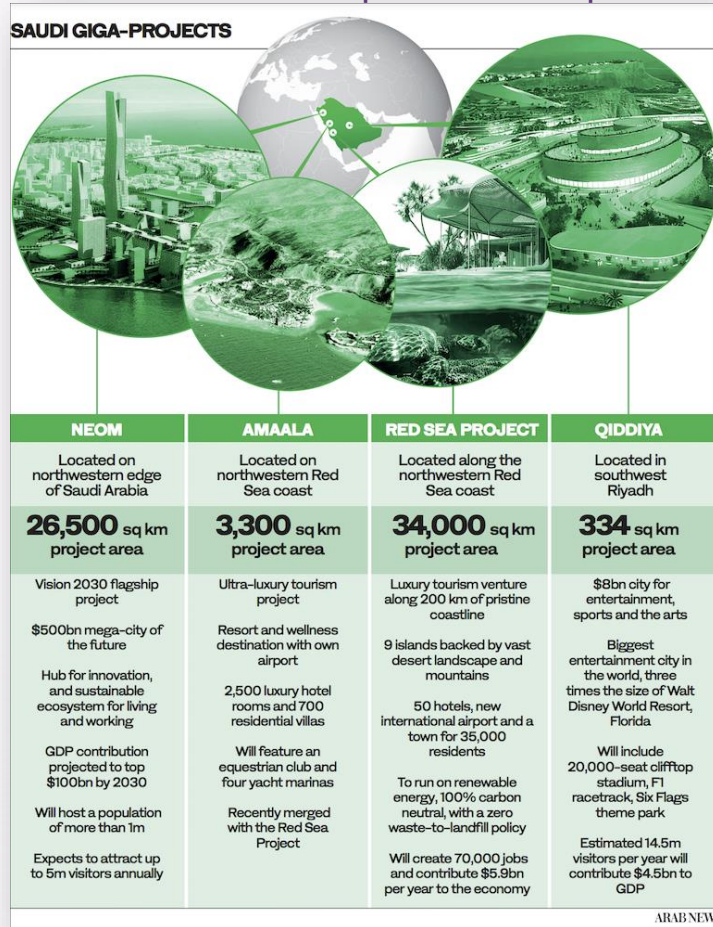
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National Aquaculture Development Strategic Plan

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X

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National Aquaculture Development Strategic Plan

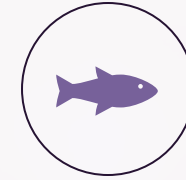
6 Strategic Objectives



Increase total production output to achieve self sufficiency target



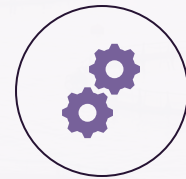
Support industry & enhance domestic competitiveness



Develop a thriving domestic seafood market



Invest in training to build capacity



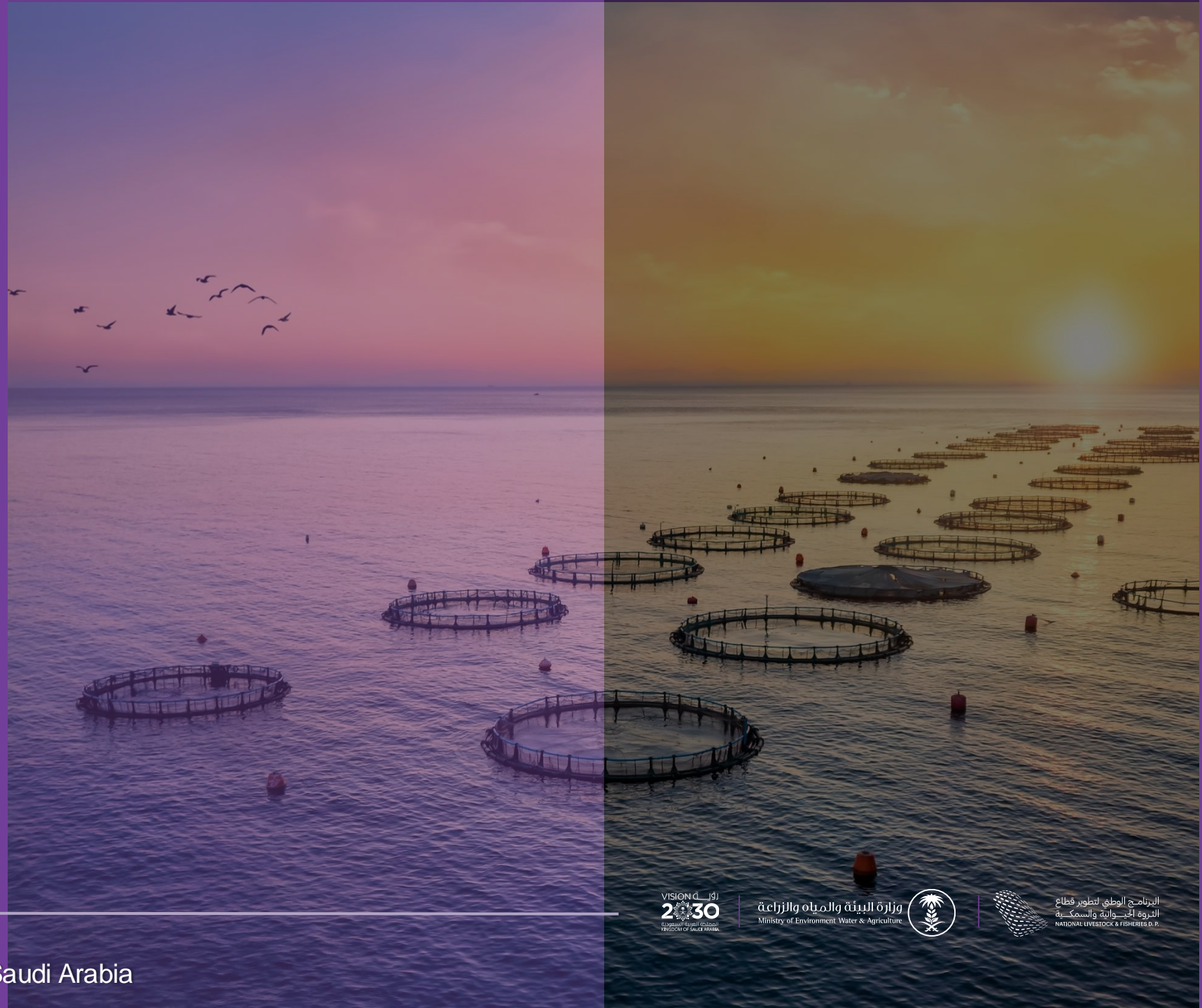
Drive government led interventions



Attract investors & foreign players

03

Aquaculture Investment Opportunities



Status of the seafood industry and investment opportunities in the Kingdom of Saudi Arabia



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Ministry of Environment, Water & Agriculture



البرنامج الوطني لتطوير قطاع
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The Red Sea : A unique environment and a gold-mine for sustainable aquaculture development

- 1 Low industrialization
- 2 Low urbanization
- 3 No wastewater runoff
- 4 No river runoff
- 5 No red tides/ no eutrophication
- 6 Suitable depths (80-30 m) Low wave heights (0.5 to 1 m)
- 7 Pristine waters and good water circulation.



Industry Growth Opportunity Drivers



PRODUCTION

• Unexploited potential for:

- 1) marine fish cage aquaculture
- 2) Intensive shrimp farming
- 3) RAS
- 4) Aquaponics
- 5) Complementary businesses

* Aqua-feed mills including alternative proteins (insect / algae / bacteria)

* Commercial hatcheries

* Logistics & Distribution

* Processing & Product Value Adding



MARKET

- Increasing population
- Young population (new lifestyle, health conscious, working couples etc.)
- New consumption trends (HoReCa/ Online sales etc.)
- Proximity to expanding international seafood markets (EU, Russia, GCC, Asia etc.)
- New demand from Giga/Mega projects (NEOM, Amaala, TRSDC, Quidiya etc.)



INVESTMENT

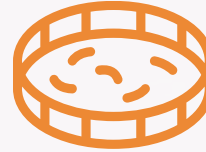
- Business friendly procedures
- Government support
- Various incentive schemes
- Foundation work (site selection/ allocation, market analyses, feasibility studies)
- Relatively lower energy costs
- Relatively lower cost of land
- Good logistic infrastructures (national/ international ports/airports, road network)

Investment Opportunities

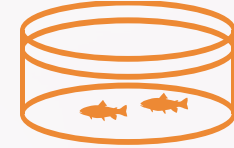
Attract investors & foreign players



Investment opportunities in lined ponds



Investment opportunities in sea cages



Investment opportunities in RAS
(Recirculating Aquaculture System)



Investment Opportunities # 3,4,5



Specie	Sobaity (Sparidentex hasta)	Production Method	Floating Sea Cages
Location	Red Sea Coast	Licensed Areas 100 Ha Offshore 10 Ha Coastal land	Licensed Capacity 2500 tons/year
Production period	13 months	Avg harvest size 800 grams	Avg FCR(e) 2.0
AVG production cost /kg*	4.82 USD	Cost breakdown /kg	
		Juveniles 0.16 USD	Feed 2.67 USD
		Labour 0.42 USD	Other 0.58 USD

*Ex-farm cost

Total Investment	CAPEX	OPEX	TOTAL		
19.964.601 USD					
Equity	4.521.272 USD	5.461.028 USD	9.982.300 USD		
Loan	4.521.272 USD	5.461.028 USD	9.982.300 USD		
TOTAL	9.042.544 USD	10.922.057 USD	19.964.601 USD		
NPV	9.962.370 USD	IRR	7.81 %	Pay back	6 years 2 months

Other Investment Opportunities (Upstream)



Hatcheries



For the national production of around 260,000 tons of marine fish, the aquaculture farms will require 840 million fish juveniles



Equally for the national production of around 250,000 tons of shrimp, the aquaculture farms will require 21 billion of shrimp PL's

Other Investment Opportunities (Upstream)



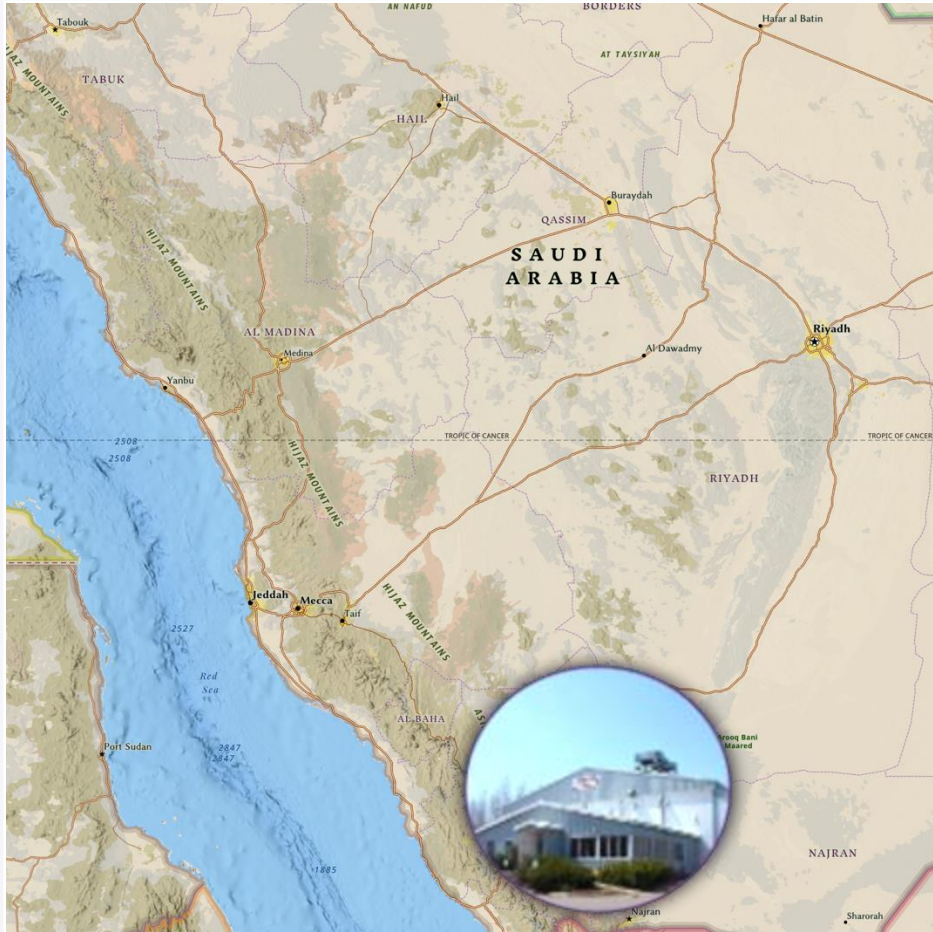
AquaFeed mills



For the national production of around 530,000 tons of aquaculture products, the aquaculture farms will require 926,000 tons of aquafeed.



Other Investment Opportunities (Downstream)



Seafood processing

Seafood processing and product value adding, based on the constant supply of high quality raw material (fish and shrimp) from the local farms, in order to satisfy the ever growing market demand for more convenient seafood products by the modern generation of consumers.

Other Investment Opportunities (Downstream)

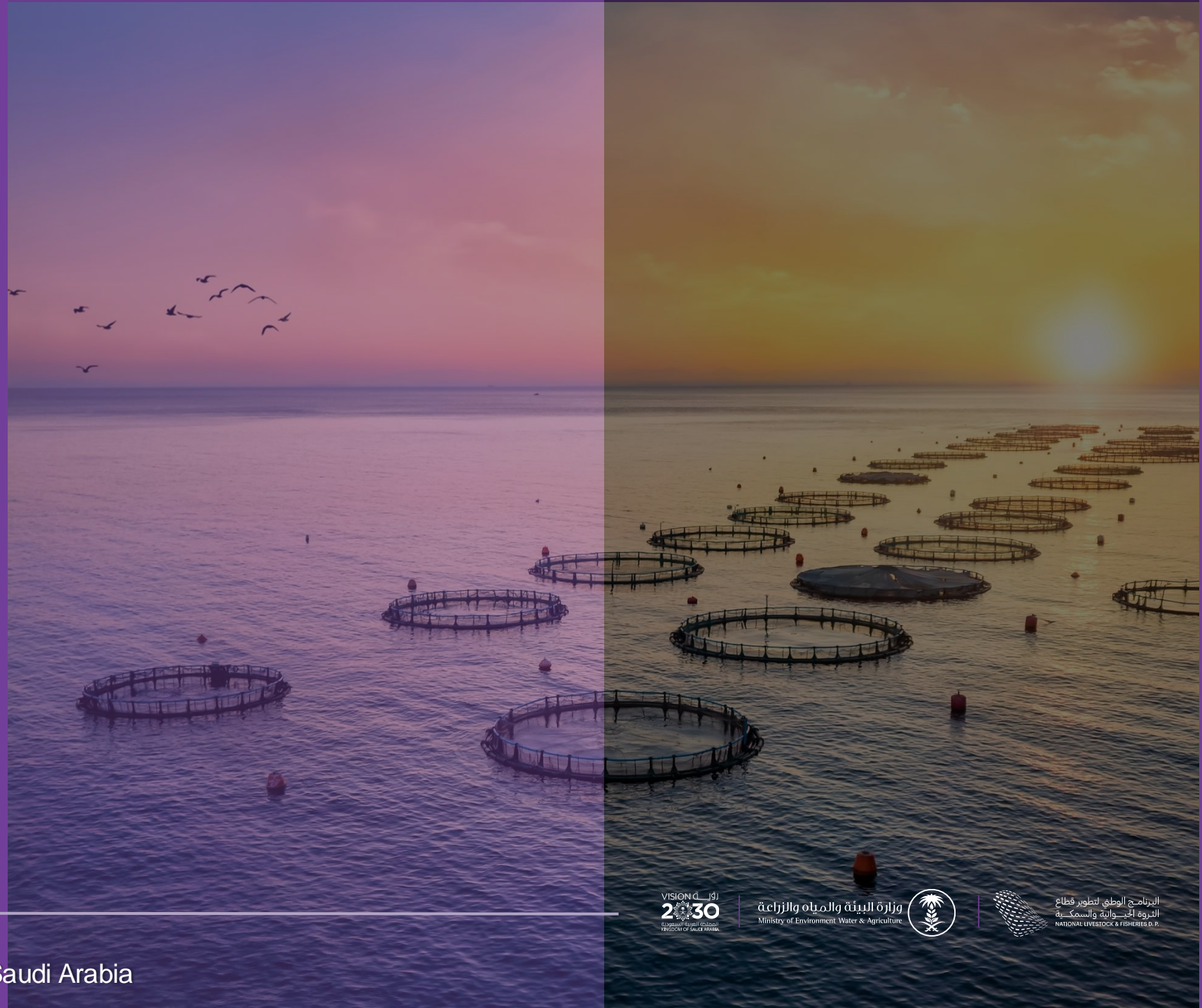


Seafood processing



04

Seafood Processing Investment Opportunities



Status of the seafood industry and investment opportunities in the Kingdom of Saudi Arabia



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الثروة الحيوانية والسكنية
NATIONAL LIVESTOCK & FISHERIES D.P.

Jazan Food Park: Integral part of the VISION 2030 plan to boost food production and resilience



Objectives

- “Ensure **development and food security**”
- “Ensure **sustainable use of water resources**”

NTP



Initiatives

- “Enable the **growth** of kingdom’s food and agriculture sector to help achieve a **sustainable domestic food production system**, **diversify external food supply sources** and ensure **food security resilience**”

PIFP



Ambitions

- “... developing **special clusters for food manufacturer** [...] increase **competitiveness of local industries** to meet 85% of local demand [...]”
- “Increasing the **contribution of aquaculture to the GDP** [...] replacing 65% of imported products [...] increasing **localization** [...] increasing **private sector investments** [...] aquaculture **production capacity**”

NIDLP



رؤية
2030
المملكة العربية السعودية
KINGDOM OF SAUDI ARABIA

We will continue to build safe and **sufficient strategic food reserves** to better guard against emergencies



Jazan Food Park: Investors Brief

Note: NTP stands for National Transformation Program; PIFP stands for Public Investment Fund; NIDLP stands for National Industrial Development and Logistics Program
Source: Vision 2030, Vision realization program, Team analysis

All regions of KSA contribute to Vision 2030, with one of the mega projects located in the Jazan Region

Key Regions, Projects and Special Economic Zones (SEZ)



- 1 **JCPDI / Jazan SEZ**
Jazan Region, KSA
- 2 **NEOM**
Tabuk, KSA
- 3 **AL ULA**
Madinah, KSA
- 4 **Red Sea Project**
Western Coast, KSA
- 5 **Ras Al-Khair SEZ**
Ras Al-Khair, KSA
- 6 **King Abdullah Economic City SEZ**
KSA
- 7 **Riyadh Integrated Special Logistics Zone**
Riyadh, KSA
- 8 **Cloud Computing SEZ**
Riyadh, KSA

Note: Jazan SEZ focus sectors: food processing, metal conversion, logistics, KAEC SEZ focus: automotive, consumer goods, ICT, pharmaceuticals, medtech, logistics; Ras Al-Khair SEZ focus: shipbuilding, rig platforms, MRO; Cloud computing SEZ focus: cloud computing services; RIZLS focus: consumer products, computer parts, pharmaceuticals, medical supplies, luxury goods
Source: Team analysis

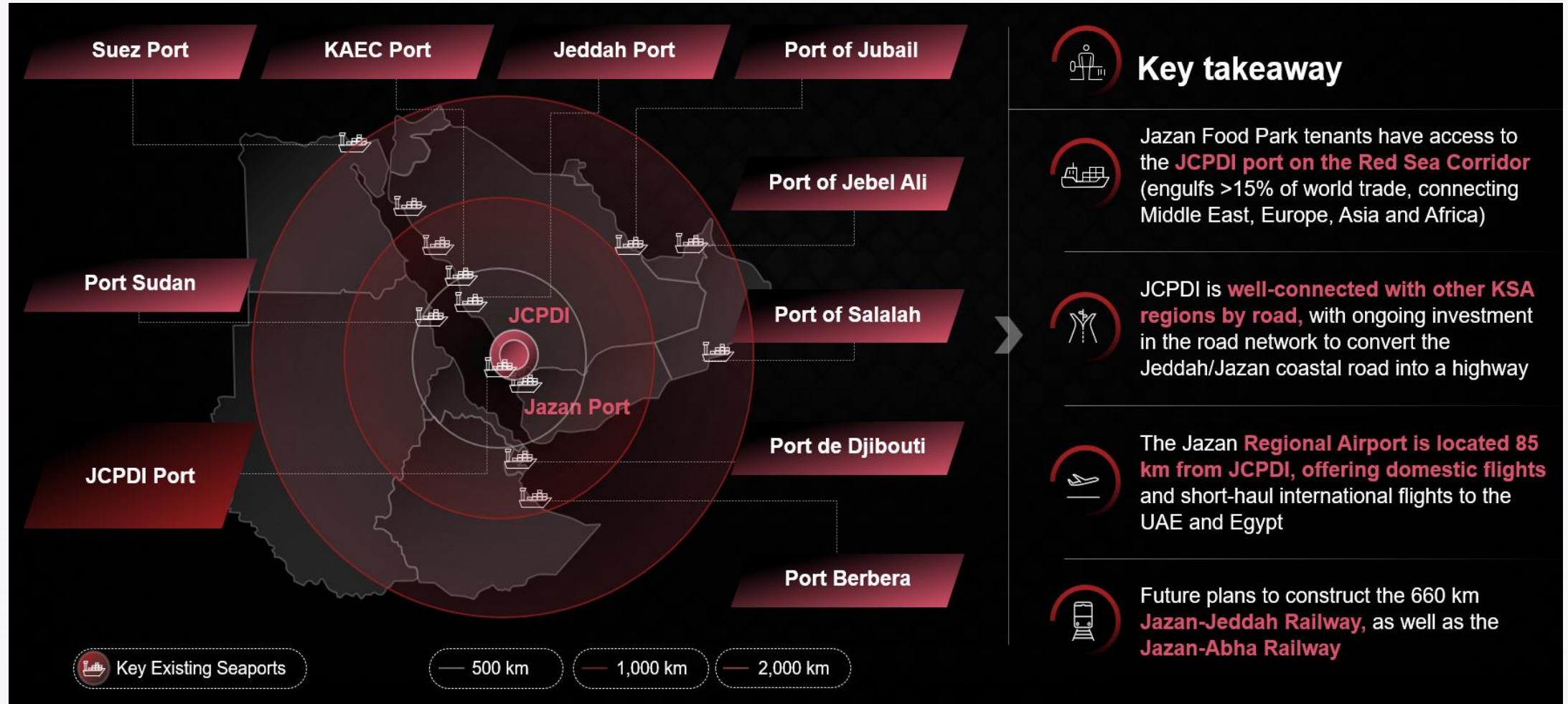


JCPDI Key insights

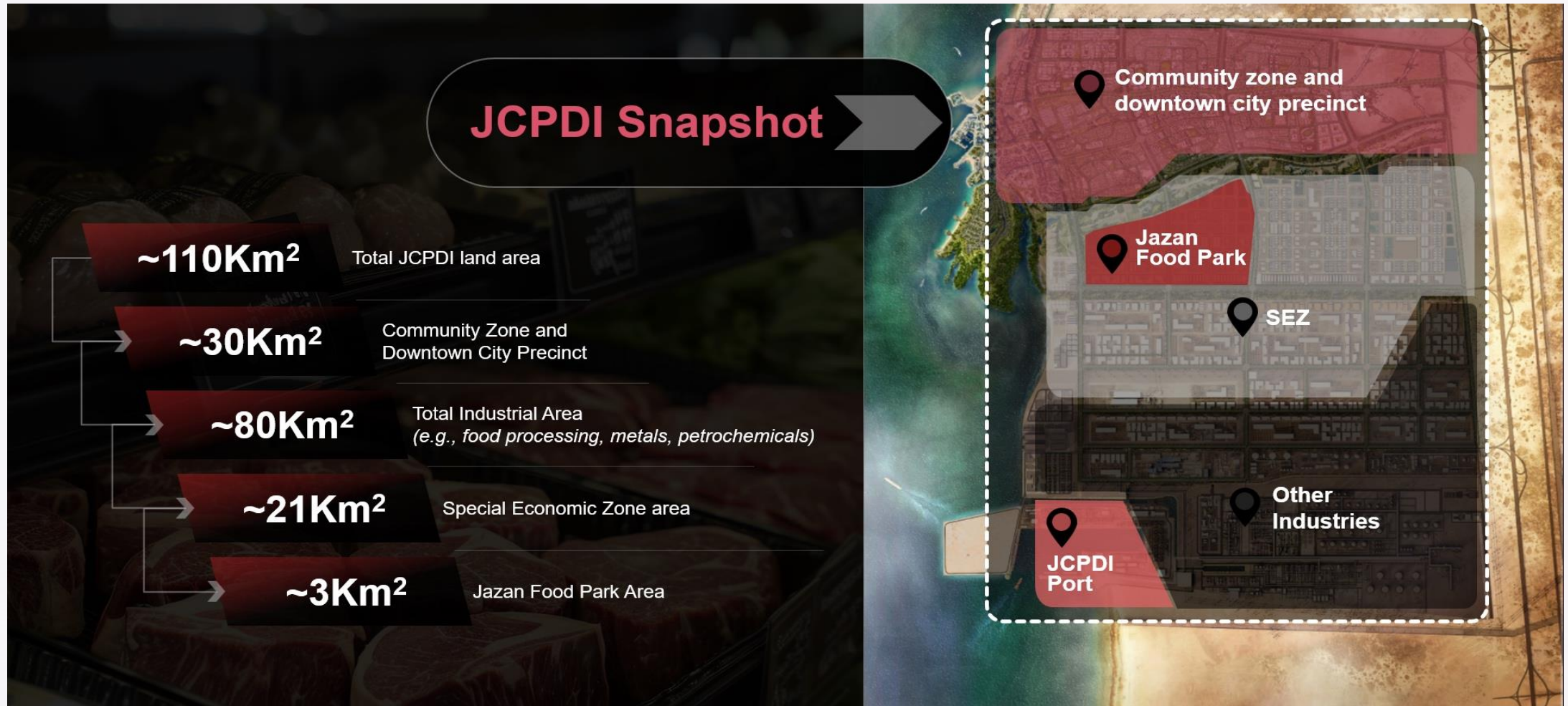
- Jazan City for Primary and Downstream Industries (JCPDI) is one of the megaprojects with **Special Economic Zone status**
- JCPDI is the only SEZ in the Kingdom dedicated to **food processing**



JFP benefits from strong connectivity to global markets and access to a competitive port



JCPDI is an industrial city hosting a SEZ and developing the Food Park



Six Reasons to Invest in Jazan Food Park



- 01 High market prospects in Seafood**
High market demand and production opportunities in Jazan for animal proteins and access to raw materials in Jazan
- 02 Tailored solutions to jumpstart operations**
Pre-built factories ranging from 500 to 1500 m2, tailored built-to-suit facilities, and available land plots available for tenants
- 03 Food processing shared and support facilities**
A variety of food-related shared and support facilities to streamline processes across the value chain, including advanced gutting, scaling, and filleting facilities, packaging facilities, cold storage, warehouses, and waste management
- 04 Compelling pack of special economic zone incentives**
Special Economic Zone status offers 5% corporate income tax for up to 20 years, 0% custom duties on capital equipment and raw materials, 0% VAT for all intra-SEZ goods, and other incentives
- 05 Ease of doing business**
One-stop shop with access to business and professional services including training
- 06 Advantageous geography and strong connectivity**
Highly strategic location along key sea trade routes, with proximity to the port unlocking export opportunities

Tailored solutions: Tenants offered 3 options to kickstart their operations

01 Leasable empty land plots

Long-term lease of Land plots of any size at an annual rate of **4.5 SAR/sqm** and access to stable, low-rate utilities (e.g., electricity, potable water, process water, wastewater treatment services)

02 Ready-built-factories

Pre-designed and pre-constructed **Ready-built Factories** in different sizes specifically constructed for food manufacturing operations, connected with essential utilities

03 Built-to-suit facilities

Custom Built-to-Suit facilities of any size tailored to investors' technical requirements and building specifications

Jazan Food Park offers state-of-the-art shared food processing and support facilities

FOOD PROCESSING SHARED FACILITIES



Advanced seafood gutting, scaling, and filleting facilities

An advanced facility where seafood is expertly processed through **gutting** to remove organs, **scaling** to remove outer inedible scales, **filleting** to prepare clean, boneless fillets that are ready for packaging and/or further processing



Storage facilities

Warehouse are temperature and humidity-controlled facilities used to store/ preserve raw materials and processed products



Packaging and canning

Advanced Packaging and Canning Facility, where food products are expertly **sealed/packed into containers, cans, or jars** for distribution and sale

SUPPORT FACILITIES



Food quality control labs

Food labs **endorsed by SFDA and equipped for Halal certification**, conduct tests and analyses to assess the **safety and quality** of seafood products and ensure that seafood products meet **regulatory requirements and industry standards**



Food-specific waste management

Jazan Food Park offers an advanced **waste management** system designed to efficiently collect and recycle food-specific waste, promoting **sustainable practices** and **industrial symbiosis** while fostering a **circular economy**



The JCPDI SEZ provides a comprehensive range of unique incentives, incl. tax and trade incentives

01



Tax and trade incentives

5% **corporate income tax** for up to 20 years

0% **unlimited withholding tax for repatriation of profits** from SEZs to foreign countries

0% **custom duties on capital equipment and inputs**

0% **value-added tax (VAT) for all intra-SEZ goods** exchanged within and between the SEZs

02



Financing schemes

SIDF industrial loans (75% of capital expenditures for 20 years)

Exemption from applicable operational fees on expats and families within SEZ

03



Regulatory incentives

Relaxation of Labor Laws on Saudization (First five years 0% Saudization, Year 6-10 – 15%)


100% Foreign Direct Ownership

Long-term contractual **land lease for up to 50 years**


JFP seafood processing tenants will have significant cost savings compared to similar operations in other regions

Production Cost Savings Opportunities


 **Access to modern shared facilities** allowing for clustering effect and economies of scale

 **Reduced Saudization targets,** allowing for employment of more non-local workers

 **Reduced Corporate Income Tax at 5%**

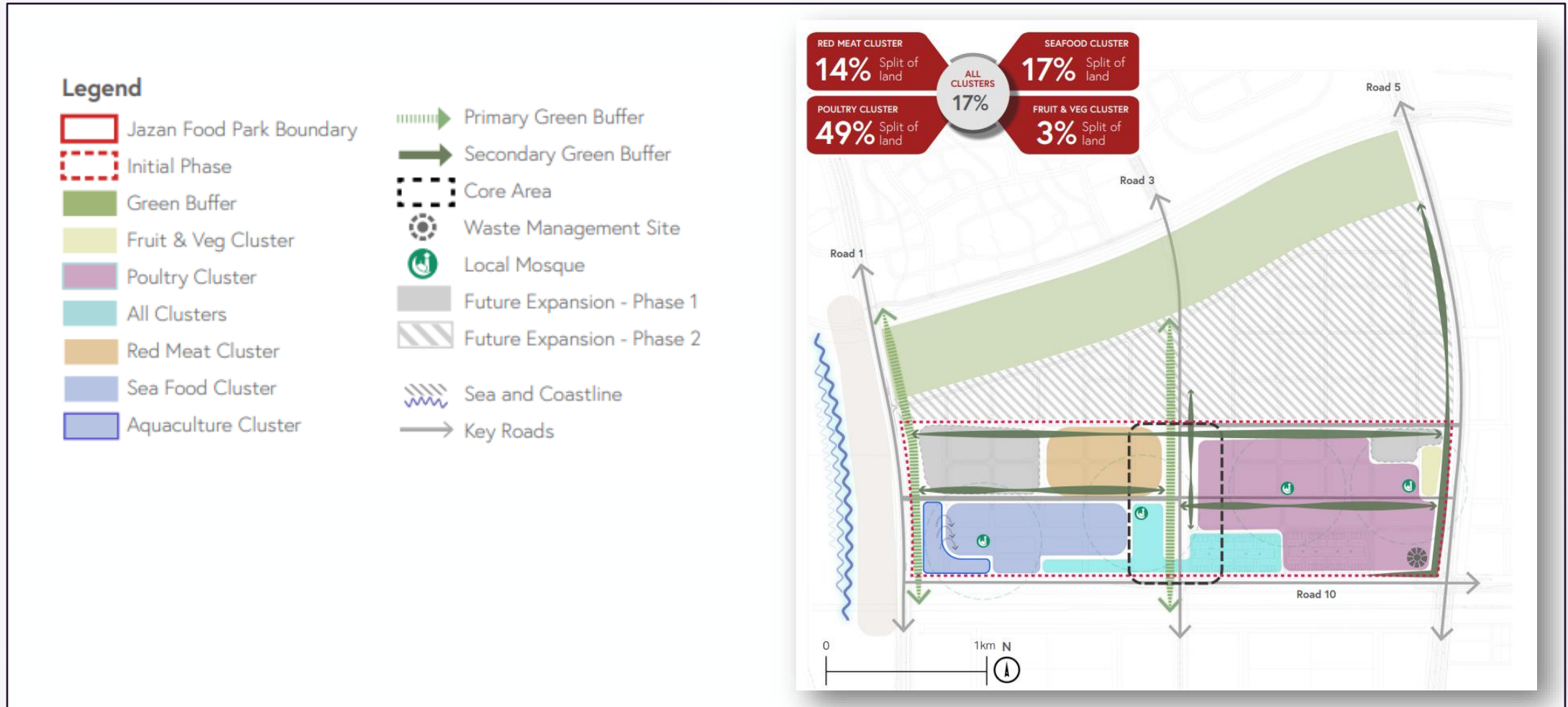
 **VAT exemptions** on intra-SEZ goods and services

 **Custom Duty Exemptions on Raw Materials and Capital Equipment**

 **Competitive Utility Costs** (e.g., potable water, industrial water, electricity)

~10-12%
production cost savings compared to other processing regions within KSA

JFP Urban Structure & Cluster Plan



JFP Shared Facilities Plan

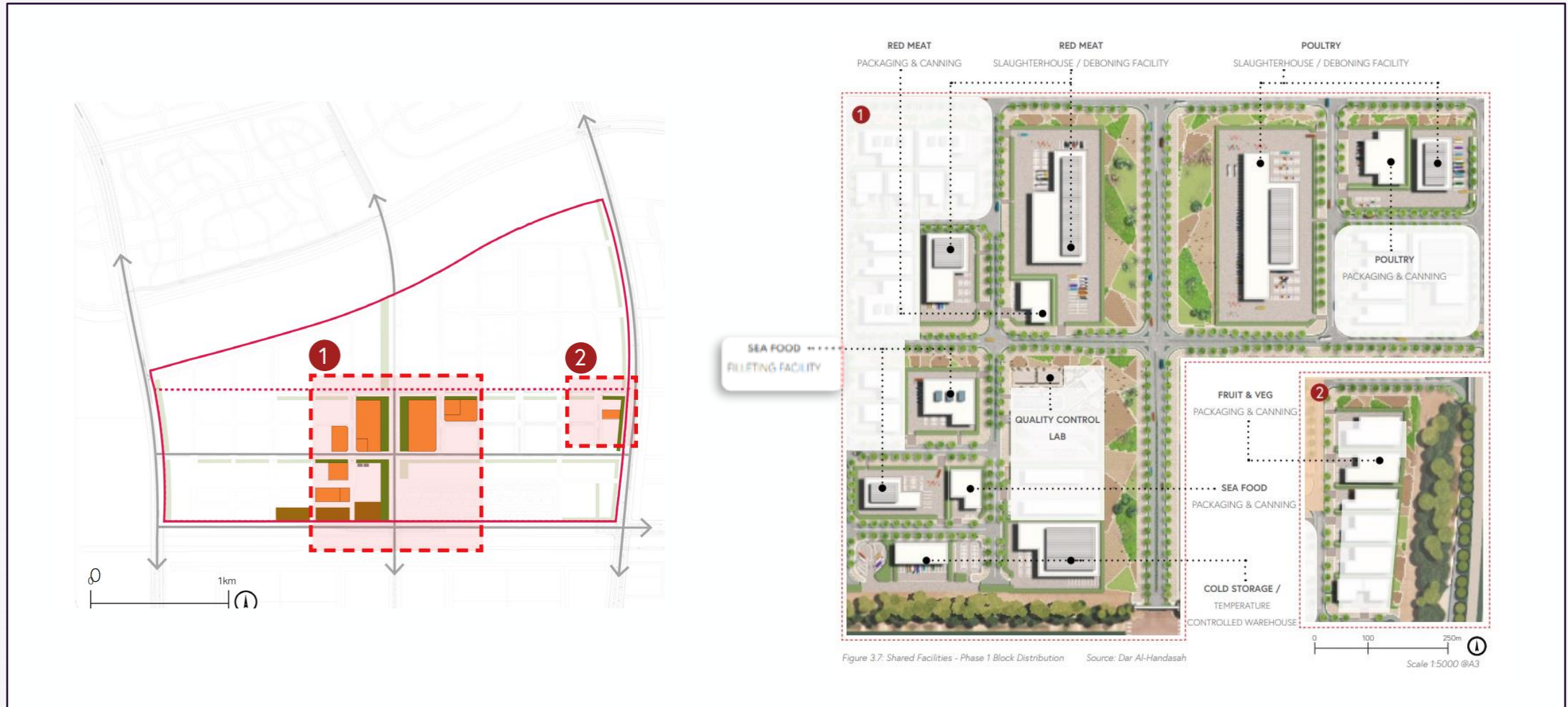


Figure 3.7: Shared Facilities - Phase 1 Block Distribution Source: Dar Al-Handasah

JFP Shared Facilities Plan



| SEE you soon @



The Most Important Aquaculture, Fisheries & Seafood Expo

Exhibitors

Algae	Seafood	Fisheries	Aquaculture
<ul style="list-style-type: none">Algae technologyEnvironmental consulting companies	<ul style="list-style-type: none">Fresh and frozen fish (exporter and importer companies)Food processing and packaging	<ul style="list-style-type: none">Fishing boatsFishing ToolsPort construction	<ul style="list-style-type: none">Aquaculture technologyInland aquacultureSolutions, equipment and training companiesUniversities and scientific collegesFeed





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Спасибо

www.nfdp.gov.sa
info@nfdp.gov.sa
[in @nfdp_ksa](https://www.instagram.com/nfdp_ksa)

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