

Fire Operations Equipment

Presented by: Khaled AlGhadhban

Business Opportunities Workshop

January 13th, 2025

This presentation may contain certain forward-looking statements. All statements other than statements relating to historical facts are, or may be deemed to be, forward-looking statements. Forward-looking statements include, but are not limited to, statements related to future events or to the company's future financial or operating performance such as the company's expectations and projections regarding its growth, initiatives and strategies, capital expenditures and investments, customer and partner relationships, major projects and product development. These statements may generally, but not always, be identified by the use of words such as "target," "goal," "aim," "believe," "expect," "commit," "anticipate," "intend," "estimate," "should," "will," "shall," "may," "likely," "plan," "strategy," "initiative," "project," "outlook" or similar expressions, including variations and the negatives thereof.

Forward-looking statements reflect the company's expectations, beliefs, estimates, forecasts, projections and assumptions, only as of the date such statements are made, and are subject to known and unknown risks, uncertainties and other important factors beyond the company's control that could cause the company's actual results, performance or achievements to be materially different from the expected results, performance, or achievements expressed or implied by such statements. Factors that could cause actual results to differ materially from the company's expectations include, among other things, the following: global supply, demand and price fluctuations of oil, gas and petrochemicals; global economic conditions; competition in the industries in which the company operates; climate change concerns, weather conditions and related impacts on the global demand for hydrocarbons and hydrocarbon-based products; risks related to the company's ability to successfully meet its ESG targets, including its failure to fully meet its GHG emissions reduction targets by 2050; conditions affecting the transportation of products; operational risk and hazards common in the oil and gas, refining and petrochemicals industries; the cyclical nature of the oil and gas, refining and petrochemicals industries; political and social instability and unrest and actual or potential armed conflicts in the MENA region and other areas; natural disasters and public health pandemics or epidemics; the management of the company's growth; the management of the company's subsidiaries, joint operations, joint ventures, associates and entities in which it holds a minority interest; exposure to inflation, interest rate risk and foreign exchange risk; risks related to operating in a regulated industry and changes to oil, gas, environmental or other regulations that impact the industries in which the company operates; legal proceedings, international trade matters, and other disputes or agreements; and other risks and uncertainties that could cause actual results to differ from the forward-looking statements in this presentation, as set forth in the latest periodic reports filed by the Saudi Arabian Oil Company ("Aramco") with the Saudi Exchange. For additional information on the potential risks and uncertainties that could cause actual results to differ from those presented please see Aramco's most recent annual periodic report filed with the Saudi Exchange and any subsequent filings thereto.

We undertake no obligation to update or revise any forward-looking statement, whether as a result of new information, future events or otherwise.

All subsequent written and oral forward-looking statements attributable to us or to persons acting on our behalf are expressly qualified in their entirety by this cautionary statement.

Introduction

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% localization of all spending



iktva in Procurement

2000+	290+
Service contracts	Corporate purchase agreements



Business Opportunities

12	210	\$35 bn
Sectors	Business Opportunities	Annual Market Size



Anchor Projects

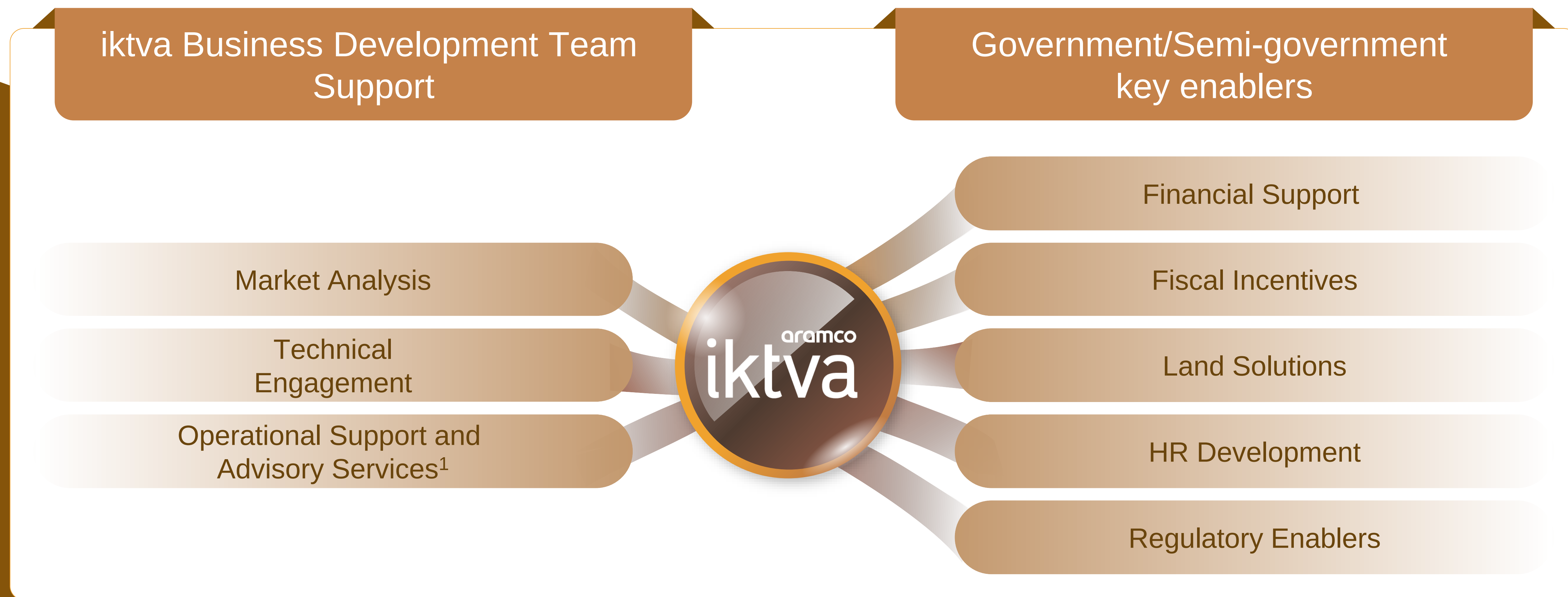
 IMI	 SPARK	 Tuwaiq
6 Anchor projects		



Local Workforce Development

16	90+
National training centers	Programs

Catalyzing Supply Chains



Catalyzing Supply Chains

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.

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

Catalyzing Supply Chains

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

How do we define what is an opportunity?



Growing market

High growth high spend markets



Limited local players & import driven

*Markets with few local contributors
and high import resilience*



Technological & labor feasibility

*Markets with accessible or
standardized technology and
available skilled labor*

KSA and other GCC fire protection market size 2025, Million USD

673

KSA market size
for opportunities in
today's fire protection
workshop

5.1%

Forecasted
5-year CAGR

Catalyzing Supply Chains

Seventeen opportunities to be discussed today

- 1 Fire Extinguishers
- 2 Fire Extinguisher/Hydrant Covers
- 3 Fire Hydrants
- 4 Fire Hydrants Mounted Monitor
- 5 Fire Pump Controllers
- 6 Fire Sprinklers Systems
- 7 Valves for Fire Water Systems
- 8 Respirator
- 9 Fire Stopping Barrier
- 10 Foam Generation Skid
- 11 Fire Alarms and Detection Systems
- 12 Fire Hose Nozzle
- 13 Fire Extinguishing Blanket
- 14 Fireman Coat and Pant
- 15 Fireman Helmet
- 16 Firefighter Boot
- 17 Safety Hood

Agenda - Business Opportunities Fire Operations Equipment

No.	Title of the Investment Opportunity	Presenter
	Opening Remarks	Khaled AlGhadhban
11	Respirator	Meshal Albash
12	Fire Hose Nozzle	Meshal Albash
13	Fire Extinguishing Blanket	Meshal Albash
14	Fireman Coat and Pant	Meshal Albash
15	Fireman Helmet	Ghala Al Hajri
16	Firefighter Boot	Ghala Al Hajri
17	Safety Hood	Ghala Al Hajri
	Closing Remarks	Khaled AlGhadhban

11 Respirators

Presented by: Meshal Albash

Respirators Opportunity Profile

1

Respirators present an attractive investment opportunity

Types



Independent Air Supply (SCBA):

1. Firefighter SCBA full set
2. Industrial SCBA full set

2

Respirators market is moderately growing; KSA being major market

38

Estimated 2025 KSA market size. Million USD

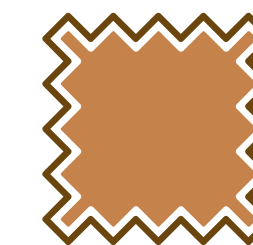
3%

Forecasted 5-year CAGR

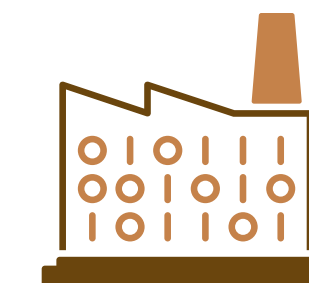
3

Attractive investment opportunities for Respirators value chain

KSA value chain opportunities



Raw materials



Manufacturing & Assembly

KSA enablers

- Financial support
- Regulatory incentives
- Technical enablers

Catalyzing Supply Chains

1. Oil, gas, and petrochemical industries where hazardous gases (e.g., hydrogen sulfide, carbon monoxide), and potential fires are a common risk

Note: SCBA = Self-Contained Breathing Apparatus;

Source: Saudi Aramco, Team analysis

Respirators

Potential Localized Categories

Type(s)

Independent Air Supply (SCBA)

Key Technical Specifications:



- Self-contained Breathing Apparatus (SCBA)
- 9COM: **6000001297**
- 9CAT: **1000973993 & 1001058774 & 1000904598**

1. Firefighter SCBA full set:

- 60 Minutes
- CARBON FIBER CYLINDER
- NFPA and NIOSH

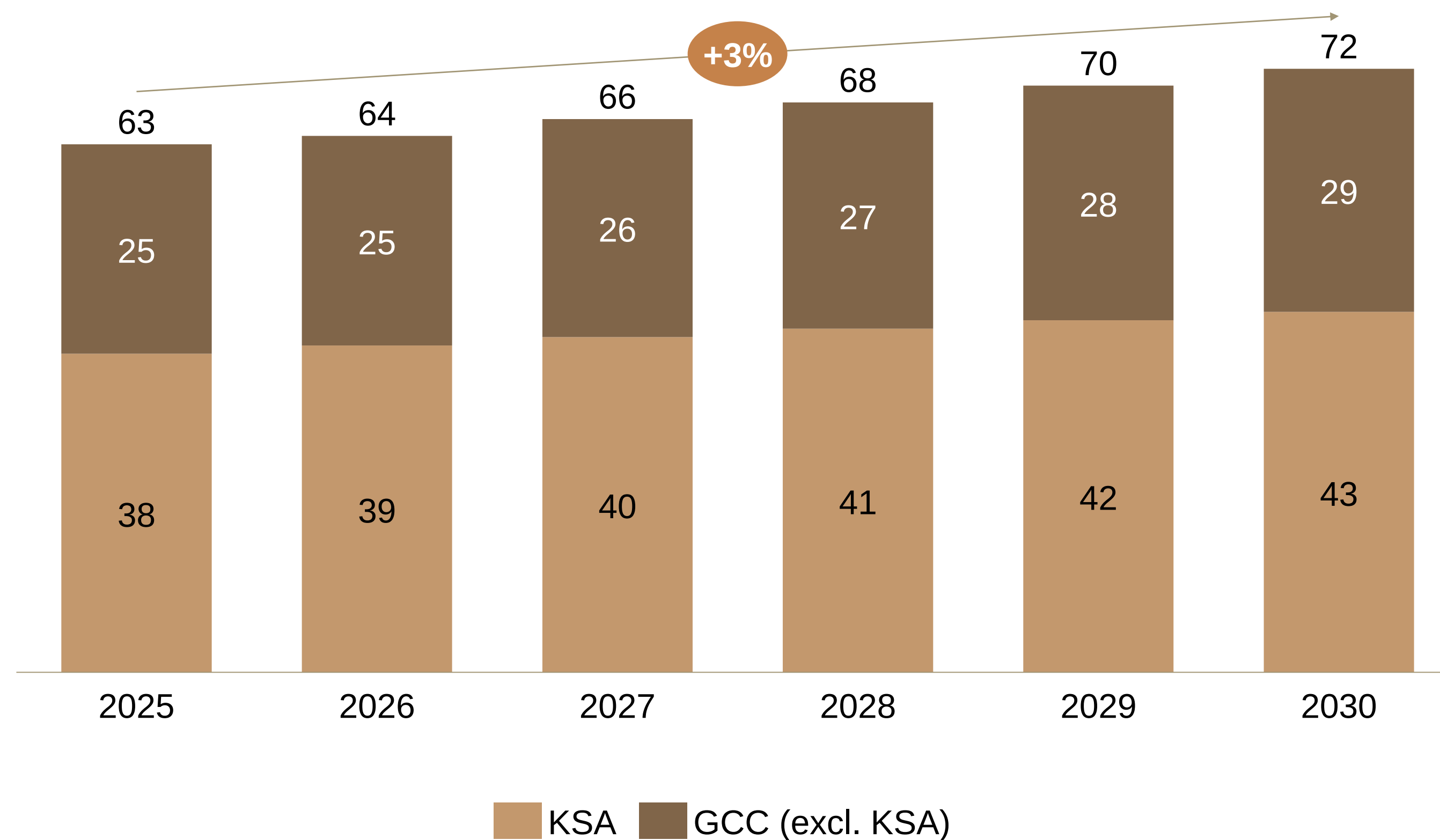
2. Industrial SCBA full set:

- 30 minutes
- Aluminum cylinder
- NIOSH
- Full Flame Resistance Clothing.
- Reflective Straps.

Catalyzing Supply Chains

Respirators Demand, Customers & Drivers

Forecasted KSA and rest of GCC Respirators market
2025-2030 (Million USD)



Respirators customers in KSA

-  Firefighting and civil defense
-  Oil & Gas facilities
-  Industrial and construction plants
-  Large venues & specialized facilities¹

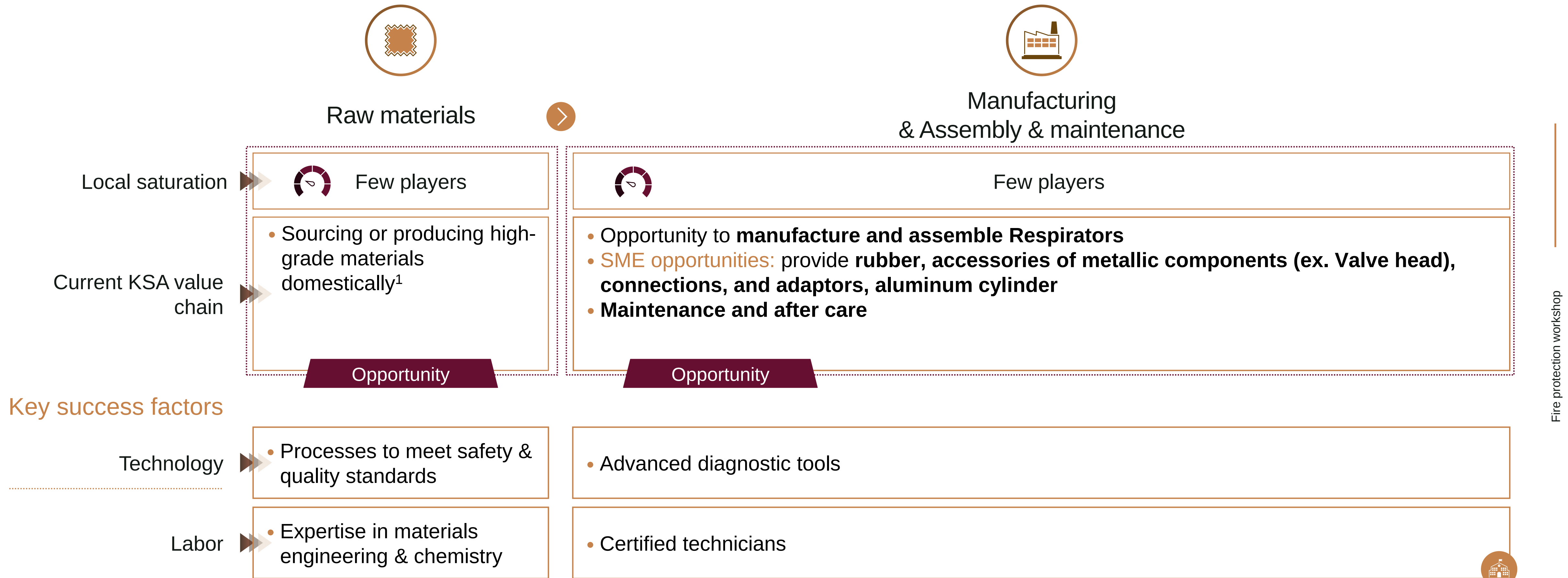
Key KSA demand drivers

- **Industrial expansion:** growth in O&G, petchem., mining, power generation, water desalination

Catalyzing Supply Chains

Respirators

Value Chain and Key Localization Opportunities



Catalyzing Supply Chains



KSA National training center available

1. E.g., activated carbon, Electrostatic fibers, etc.
Source: Data Bridge Market Research; Expert inputs; Team analysis

Respirators

Investment Opportunity and Enablers

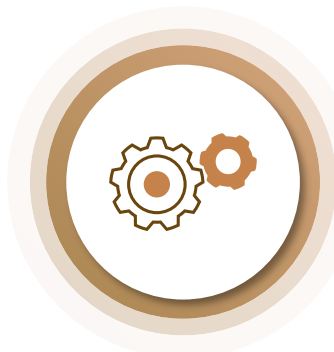
Key enablers in KSA to drive success



Financial support: Access to subsidized capital and financial support from SIDF (e.g., WC loans, 'Afaq' program)

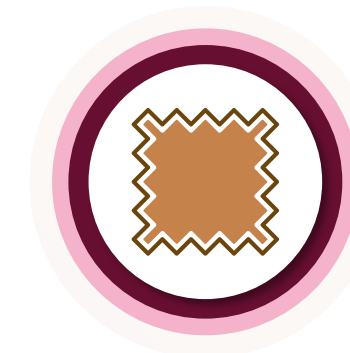


Regulatory incentives: Mandatory local procurement quotas for public and private firefighting needs



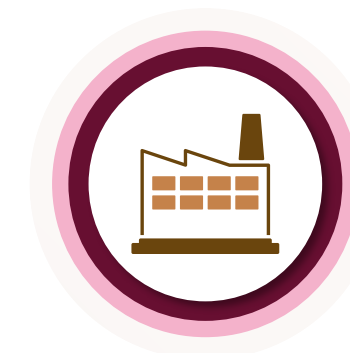
Technical Enablers: Advanced manufacturing support from KACST on technical guidance and infrastructure setup

Where is the opportunity



Raw materials

Source or produce high-grade materials domestically¹



Manufacturing & Assembly

Manufacture & assemble all types of respirators
For SMEs - opportunity to provide spare parts and components

Catalyzing Supply Chains

1. E.g., activated carbon, Electrostatic fibers, etc.

Note: SIDF = Saudi Industrial Development Fund; KACST = King Abdulaziz City for Science and Technology;

Source: Expert inputs; Team analysis

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Fire Hose Nozzle

Presented by: Meshal Albash

Fire Hose Nozzle Opportunity Profile

1

Fire Hose Nozzle present an attractive investment opportunity

Types



Firefighting hose nozzle



Occupant hose nozzle



Live hose reel nozzle

2

Fire hose nozzle market is moderately growing; KSA being 60%+

10

Estimated 2025 KSA market size. Million USD

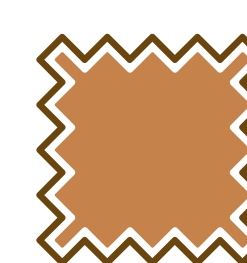
2%

Forecasted 5-year CAGR

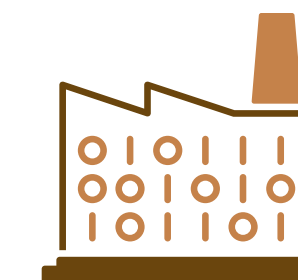
3

Attractive investment opportunities for Fire hose nozzle value chain

KSA value chain opportunities



Raw materials



Manufacturing & Assembly

KSA enablers

- Financial support
- Export duty exemptions
- Land and infrastructure

Catalyzing Supply Chains

1. Oil, gas, and petrochemical industries where hazardous gases (e.g., hydrogen sulfide, carbon monoxide), and potential fires are a common risk;
Source: Saudi Aramco, Team analysis

Fire Hose Nozzle

Potential Localized Categories

Type(s)

Firefighting hose
nozzle



Occupant hose
nozzle



Live hose reel
nozzle



Key Technical Specifications:

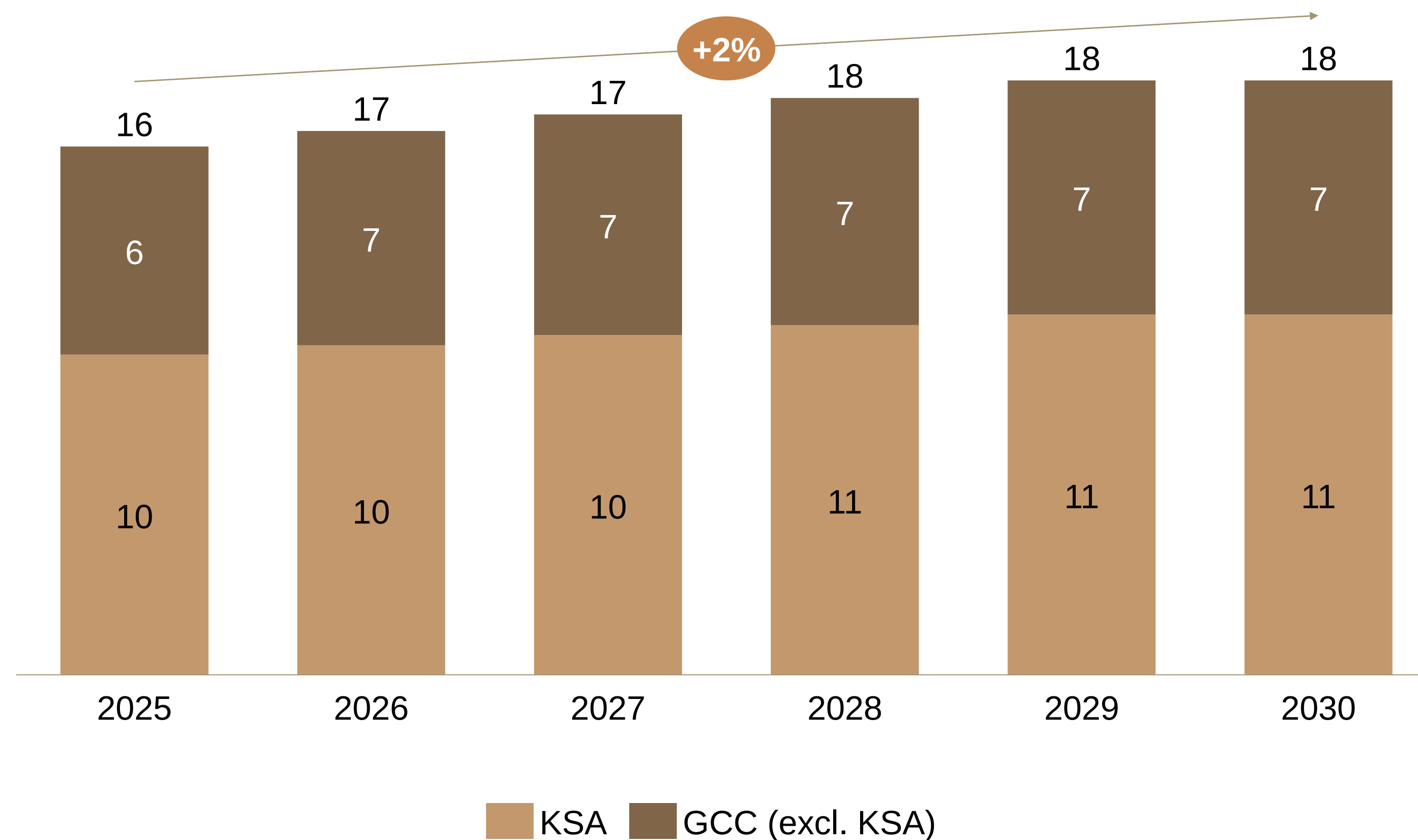
- 9COM: Multiple number and can be provided upon request

Applications

- **FIXED APPLICATIONS:**
 - UL LISTED, FM APPROVD, US COAST GUARD OR VdS CERTIFIED.
 - Copper Alloys (less than 16% zinc).
 - Hand grip.
- **PORTABLE APPLICATIONS:**
 - UL LISTED OR FM APPROVED.
 - Aluminum alloys.
 - Hand grip.

Fire Hose Nozzle Demand, Customers & Drivers

Forecasted KSA and rest of GCC Fire hose nozzle market
2025-2030 (Million USD)



Fire hose nozzle customers in KSA

-  Firefighters
-  Oil & Gas facilities
-  Industrial, power, construction plants

Key KSA demand drivers

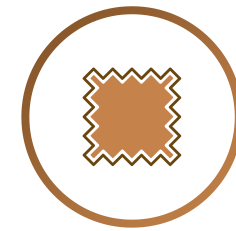
- **Industrial expansion and diversification:** growth in O&G, petchem., manufacturing, power generation, water desalination
- **Firm regulations:** HCIS has been granted increased authority to regulate safety policies

Catalyzing Supply Chains

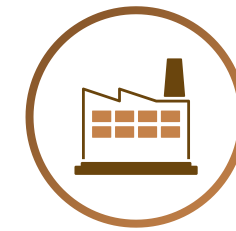
Note: HCIS = High Commission for Industrial Security
Source: Saudi Aramco, Team analysis

Fire Hose Nozzle

Value Chain and Key Localization Opportunities



Raw materials



Manufacturing
& Assembly

Local saturation



Few players



Few players

Current KSA value
chain

- Sourcing or producing high-grade materials domestically¹

- Opportunity to **manufacture Fire Hose Nozzle**
- **SME opportunities:** provide **metal components, rubber components and provide coating services**

Opportunity

Opportunity

Key success factors

Technology

- Advanced material processing technologies

- Precision engineering (e.g., CNC machining)

Labor

- Expertise in metallurgy and materials science

- Expertise in design software & manufacturing processes

Catalyzing Supply Chains



KSA National training center available

1. E.g., aluminum alloys, brass, stainless steel, plastic polymers;
Source: Expert inputs; Team analysis

Fire Hose Nozzle

Investment Opportunity and Enablers

Key enablers in KSA to drive success



Financial support: Access to subsidized capital and financial support from SIDF (e.g., WC loans, 'Afaq' program)

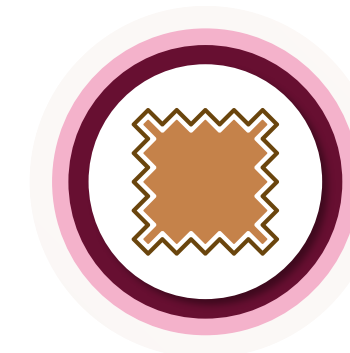


Export duty exemptions: Custom duties exemption on machinery and raw materials via the Industrial Center

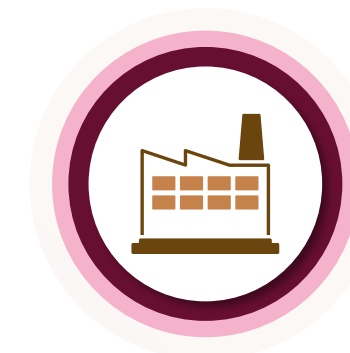


Land and infrastructure: Subsidized land and infrastructure in economic zones (e.g., Modon) reduce setup costs & accelerate

Where is the opportunity



Raw materials
Source or produce high-grade materials domestically¹



Manufacturing & Assembly
Opportunity to manufacture Fire Hose Nozzle
For SMEs - opportunity to provide spare parts and components

Catalyzing Supply Chains

Note: SIDF = Saudi Industrial Development Fund; 1. E.g., aluminum alloys, brass, stainless steel, plastic polymers.
Source: Expert inputs; Team analysis

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Fire Extinguisher Blanket

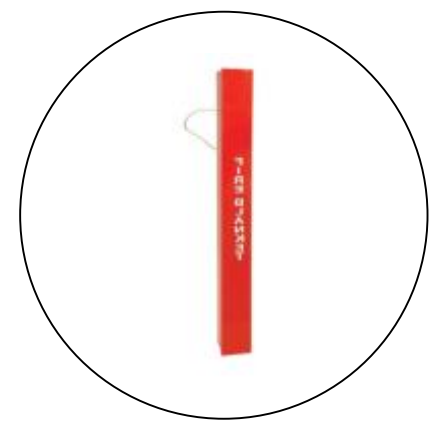
Presented by: Meshal Albash

Fire Extinguishing Blanket Opportunity Profile

1

Fire Extinguishing Blanket present an attractive investment opportunity

Types



Wrap around wool blanket

2

Extinguishing Blanket market is moderately growing; KSA being major customer

19

Estimated 2025 KSA market size. Million USD

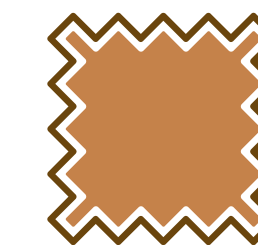
2%

Forecasted 5-year CAGR

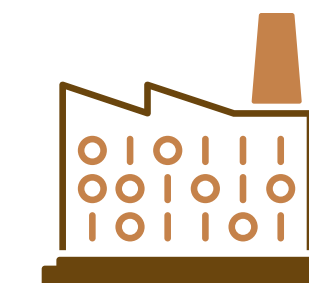
3

Attractive investment opportunities for Extinguishing Blanket value chain

KSA value chain opportunities



Raw materials



Manufacturing

KSA enablers

- Financial support
- Export duty exemptions
- Price preferential

Catalyzing Supply Chains

1. Oil, gas, and petrochemical industries where potential fires are a common risk;
Source: Saudi Aramco, Team analysis

Fire Extinguishing Blanket Potential Localized Categories

Type(s)

Wrap around wool blanket



Applications

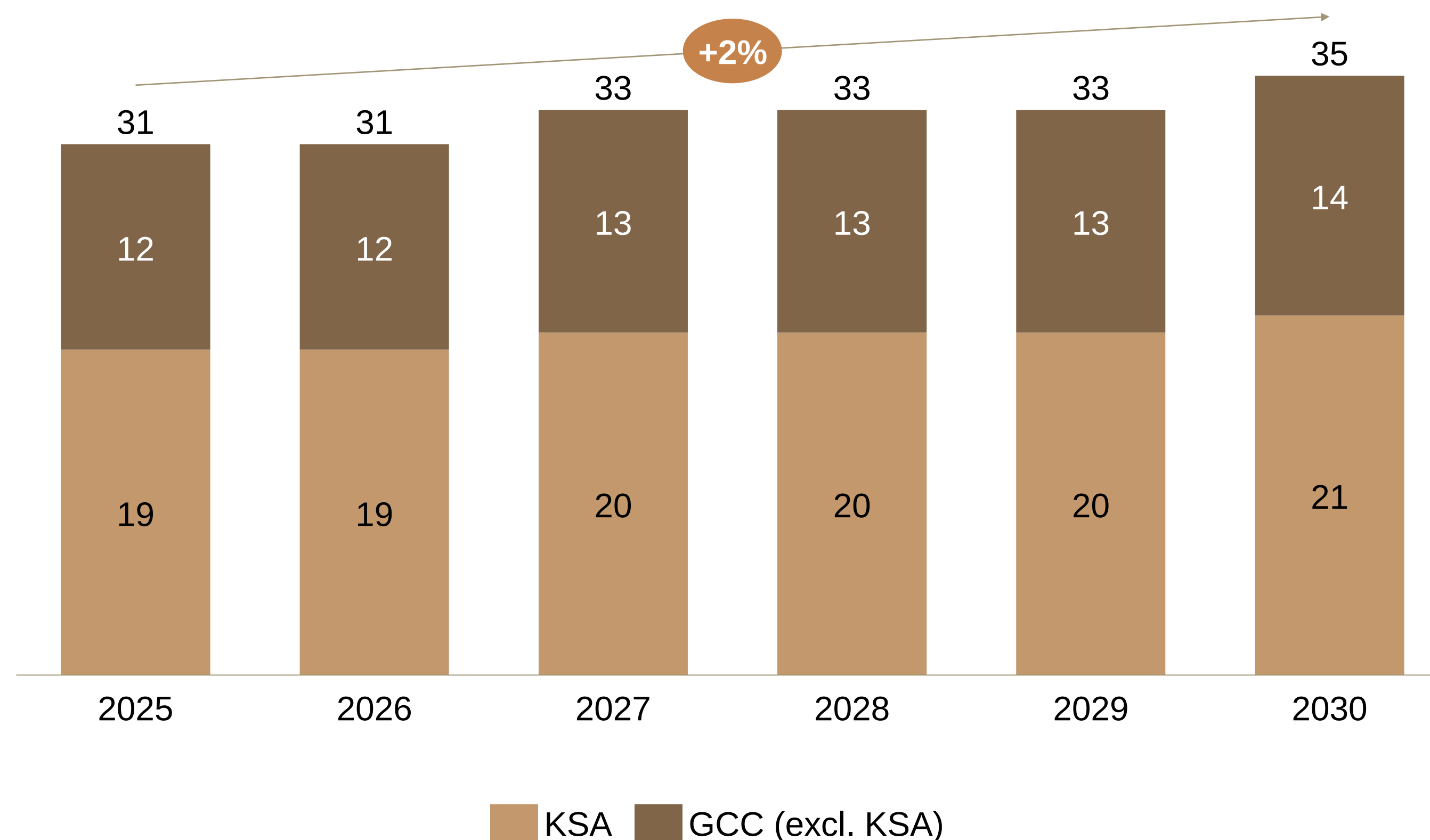
Used by Oil and Gas Industries and its Commercial Applications

Key Technical Specifications:

- BLANKET; FIRE TYPE
- SIZE 1574.8 MM (62 IN) WD X 2082.8 MM (82 IN) LG.
- 100% WOOL
- FIRE RESISTANT TREATED.
- WALL MOUNTED TYPE BLANKET KIT.
- WRAP AROUND.
- METALLIC RED BOX WITH REFLECTIVE TEXT AND HIGH QUALITY PAINT (RAL 3000).
- 9CAT: **1000124087**
- UL Listed

Fire Extinguishing Blanket Demand, Customers & Drivers

Forecasted KSA and rest of GCC Fire Extinguishing Blanket market
2025-2030 (Million USD)



Fire Extinguishing Blanket customers in KSA

-  Residential & commercial properties
-  Oil & Gas facilities
-  Industrial & manufacturing facilities

Key KSA demand drivers

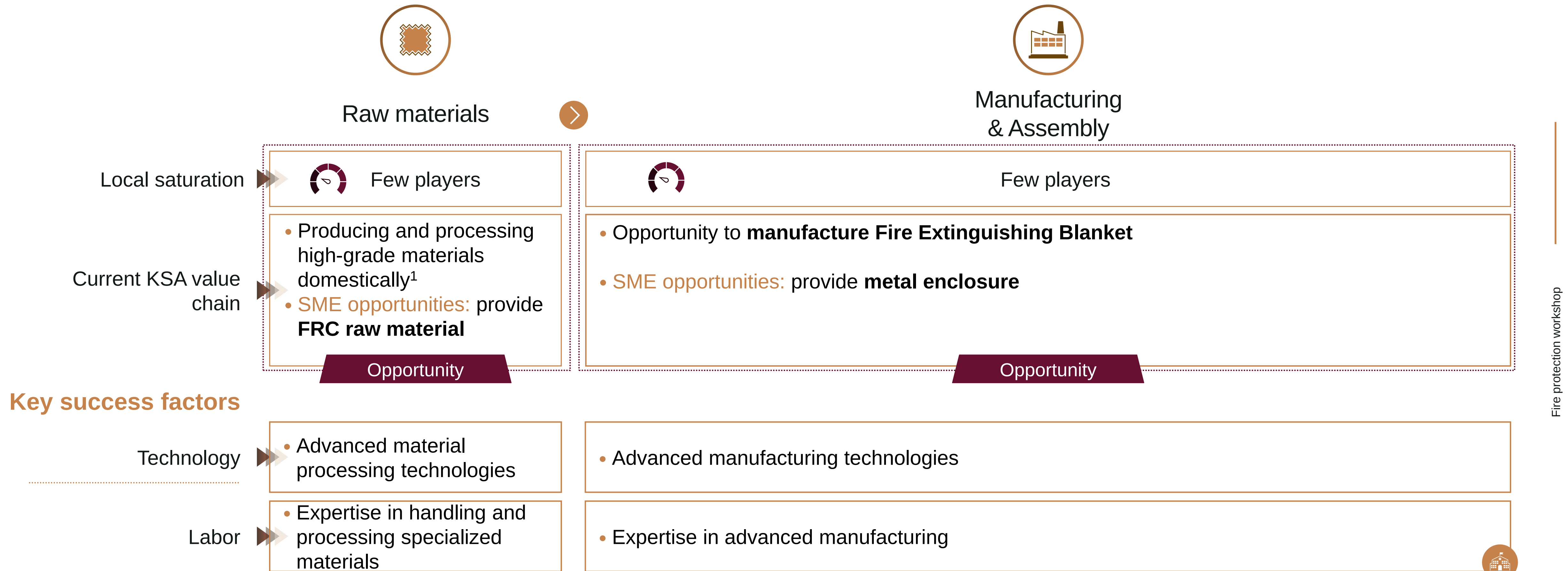
- **Industrial expansion and diversification:** growth in O&G, petchem., manufacturing, power generation, water desalination
- **Firm regulations:** HCIS has been granted increased authority to regulate safety policies

Catalyzing Supply Chains

Note: HCIS = High Commission for Industrial Security
Source: Saudi Aramco, Team analysis

Fire Extinguishing Blanket

Value Chain and Key Localization Opportunities



Catalyzing Supply Chains



KSA National training center available

1. E.g., fiberglass, silicone coating, aramid fibers;
Source: Expert inputs; Team analysis

Fire Extinguishing Blanket

Investment Opportunity and Enablers

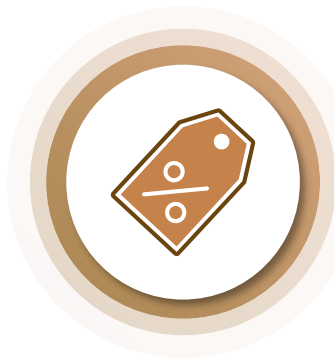
Key enablers in KSA to drive success



Financial support: Access to subsidized capital and financial support from SIDF (e.g., WC loans, 'Afaq' program)

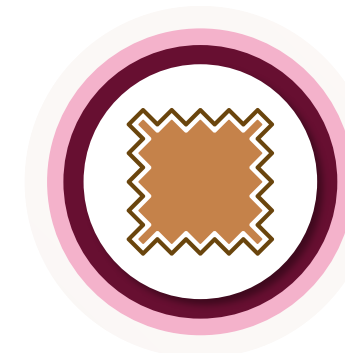


Export duty exemptions: Custom duties exemption on machinery and raw materials via the Industrial Center



Price preferential: 10% lower price for locally manufactured products by Local Content & Government Procurement Authority

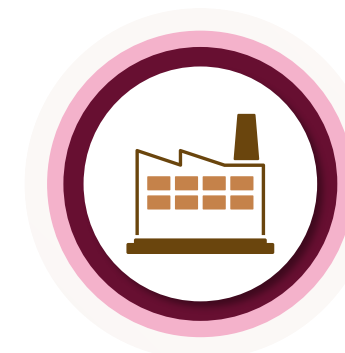
Where is the opportunity



Raw materials

Source or produce high-grade materials domestically¹

For SMEs - opportunity to provide raw materials (FRC)



Manufacturing

Increase localized manufacturing of blanket

For SMEs - opportunity to provide components

Catalyzing Supply Chains

Note: SIDF = Saudi Industrial Development Fund; 1. E.g., fiberglass, silicone coating, aramid fibers.
Source: Expert inputs; Team analysis

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Fireman Coat and Pant

Presented by: Meshal Albash

Fireman Coat and Pant Opportunity Profile

1

Fireman Coat and Pant present an attractive investment opportunity

Type



Structural

2

Fireman Coat & Pant market is moderately growing; KSA being major market

27

Estimated 2025 KSA market size. Million USD

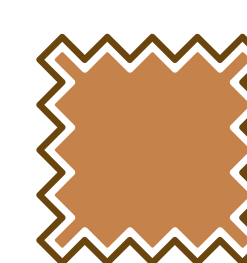
2%

Forecasted 5-year CAGR

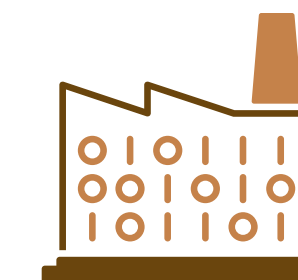
3

Attractive investment opportunities for Fireman Coat & Pant value chain

KSA value chain opportunities



Raw materials



Manufacturing

KSA enablers

- Financial support
- Regulatory incentives
- Streamlined licensing

Catalyzing Supply Chains

Fireman Coat and Pant Potential Localized Categories

Type(s)

Structural



Applications

Used by Fire Department in the Industrial Applications

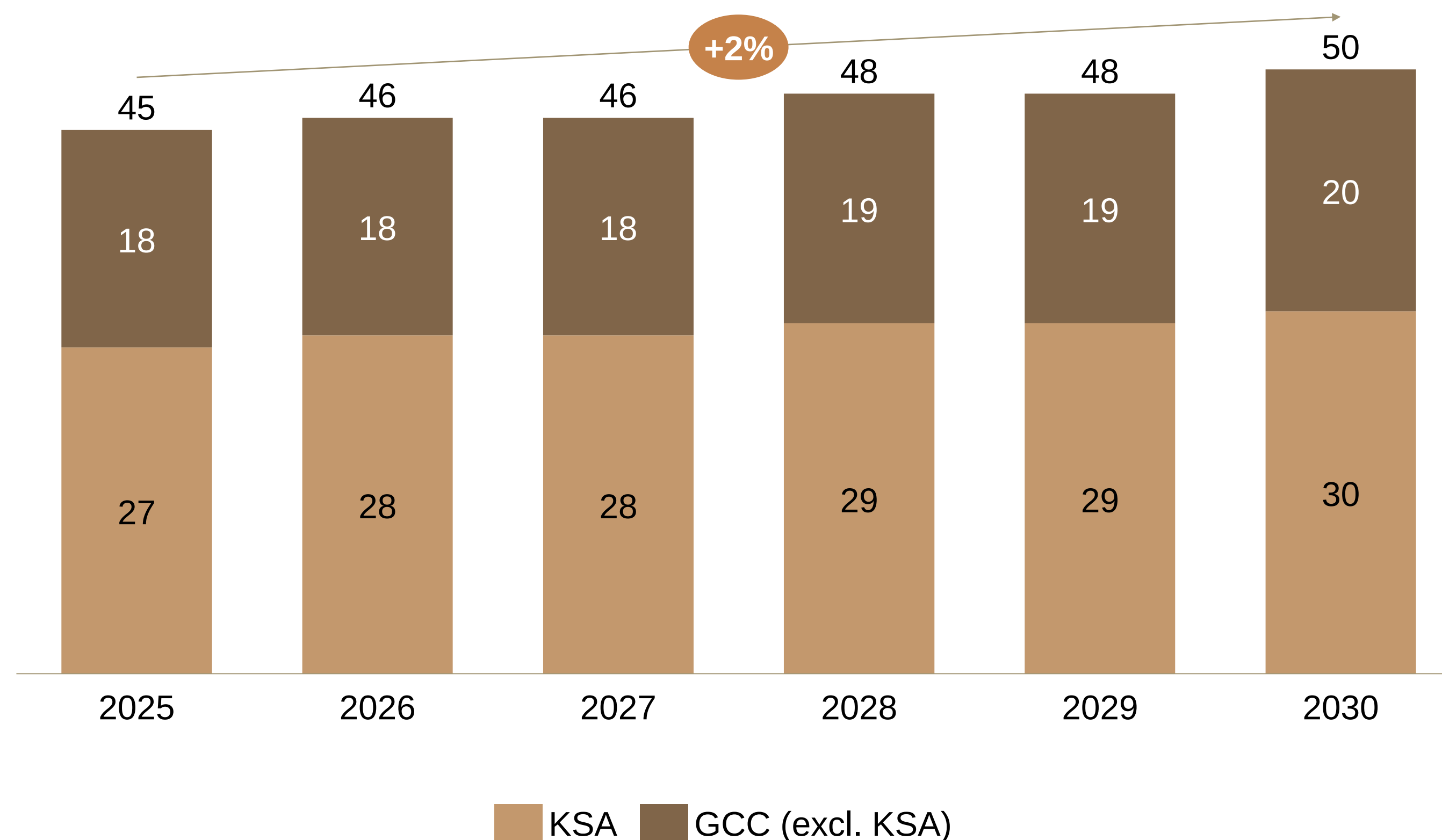
Key Technical Specifications:

- 9CAT: 1000129126 & 1000129121 & 100012060 & 1000129064 & 1000129067 & 1000788020 & 1000788021 & 1000130247 & 1000130300 & 1000130307 & 1000130362 & 1000130367
- Outer shell Ripstop 40% PBI 60% KEVLAR
- Thermal Liner 2 Layer Spunlaced Nomex
- Color in Gold / Tan Light Brown
- Stainless Steel Suspender Buttons
- UL Certified/Listed
- NFPA 1971 Standard on Protective Ensembles for Structural Fire Fighting and Proximity Fire Fighting
- NFPA 1977 Standard on Protective Clothing and Equipment for Wildland Fire Fighting and Urban Interface Fire Fighting

Catalyzing Supply Chains

Fireman Coat and Pant Demand, Customers & Drivers

Forecasted KSA and rest of GCC Fireman Coat and Pant market
2025-2030 (Million USD)



Fireman Coat and Pant customers in KSA

-  Government & Civil defense agencies
-  Oil & Gas facilities
-  Industrial, construction, manufacturing facilities

Key KSA demand drivers

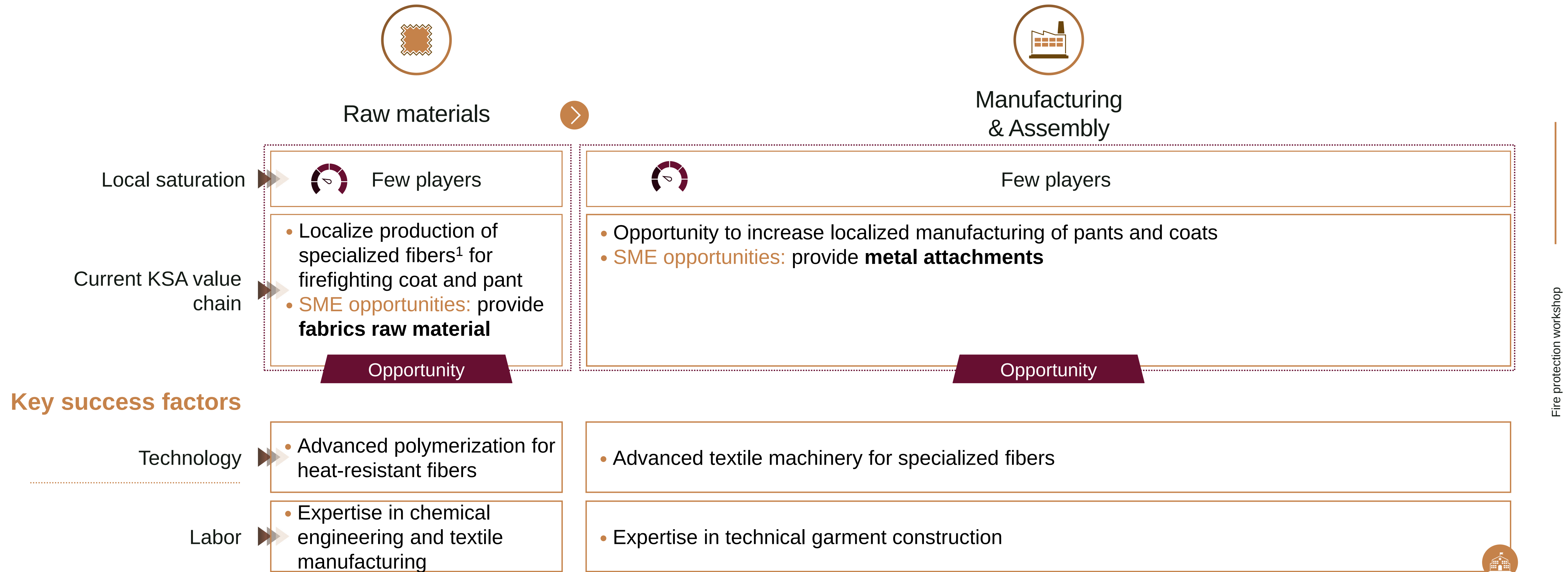
- **Industrial expansion and diversification:** growth in O&G, petchem., manufacturing, power generation, water desalination
- **Firm regulations:** HCIS has been granted increased authority to regulate safety policies

Catalyzing Supply Chains

Note: HCIS = High Commission for Industrial Security
Source: Saudi Aramco, Team analysis

Fireman Coat and Pant

Value Chain and Key Localization Opportunities



Catalyzing Supply Chains



KSA National training center available

1. E.g., Aramid, polybenzimidazole, modacrylic fibers
Source: Expert inputs; Team analysis

Fireman Coat and Pant

Investment Opportunity and Enablers

Key enablers in KSA to drive success



Financial support: Access to subsidized capital and financial support from SIDF (e.g., WC loans, 'Afaq' program)

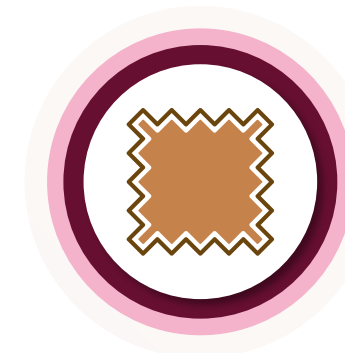


Regulatory incentives: Mandatory local procurement quotas for public and private firefighting needs



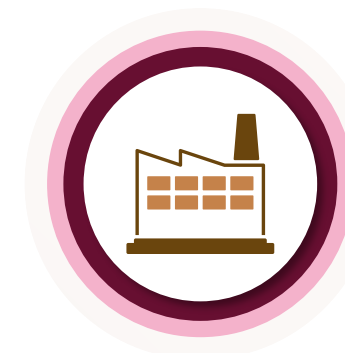
Streamlined licensing: Simplified processes and approvals to encourage new entrants in fire-resistant apparel production

Where is the opportunity



Raw materials

Localize production of specialized fibers¹ for firefighting coat and pant
For SMEs - opportunity to provide fabrics



Manufacturing

Opportunity to increase localized manufacturing of pants and coats
For SMEs - opportunity to provide metal attachments

Catalyzing Supply Chains

Note: SIDF = Saudi Industrial Development Fund; 1. E.g., Aramid, polybenzimidazole, modacrylic fibers.
Source: Expert inputs; Team analysis

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Fireman Helmet

Presented by: Ghala Al Hajri

Fireman Helmet Opportunity Profile

1

Fireman Helmet present an attractive investment opportunity

Types



Structural

2

Fireman Helmet market is moderately growing; KSA being major market

3.6

Estimated 2025 KSA market size. Million USD

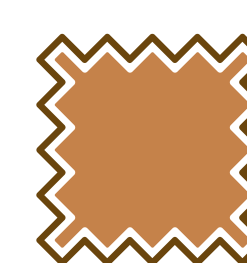
2%

Forecasted 5-year CAGR

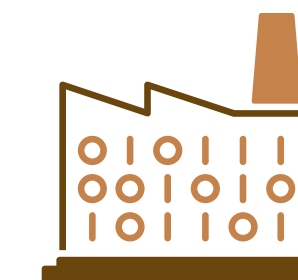
3

Attractive investment opportunities for Fireman Helmet value chain

KSA value chain opportunities



Raw materials



Manufacturing

KSA enablers

- Financial support
- Regulatory incentives
- Streamlined licensing

Catalyzing Supply Chains

Fireman Helmet

Potential Localized Categories

Type(s)

Structural



Applications

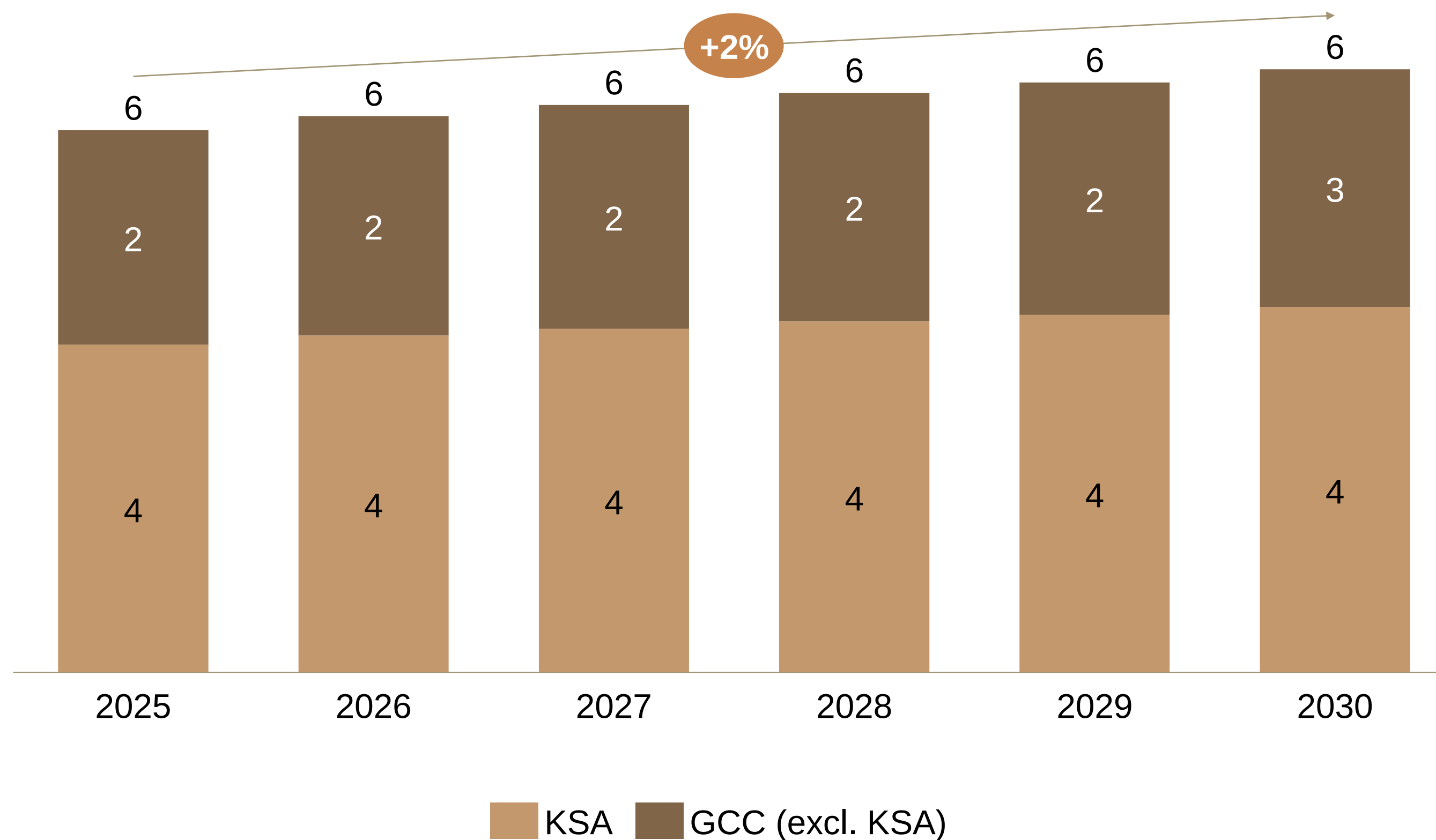
Used by Fire Department in the Industrial Applications

Key Technical Specifications:

- 9CAT: **1000129955 & 1000129958 & 1000129967 & 1000129860**
- Fiber Glass
- NOMEX Earflaps & Neck Protection
- Strap Web Suspension With Synergistic Strap Lock System
- Removable & Replacement Impact Cap
- NFPA 1971 Standard on Protective Ensembles for Structural Fire Fighting and Proximity Fire Fighting
- OSHA 1971 & 1981

Fireman Helmet Demand, Customers & Drivers

Forecasted KSA and rest of GCC Fireman Helmet market
2025-2030 (Million USD)



Fireman Helmet customers in KSA

-  Government & Civil defense agencies
-  Oil & Gas facilities
-  Industrial, construction, manufacturing facilities

Key KSA demand drivers

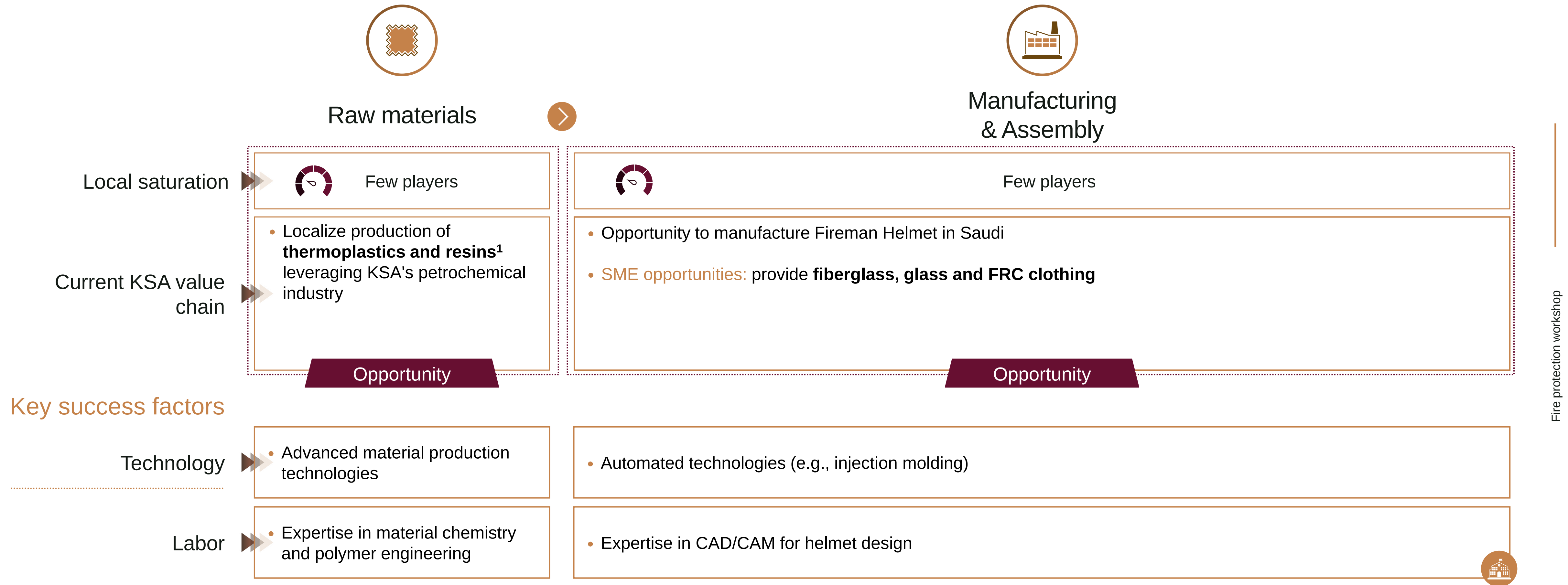
- **Industrial expansion and diversification:** growth in O&G, petchem., manufacturing, power generation, water desalination
- **Firm regulations:** HCIS has been granted increased authority to regulate safety policies

Catalyzing Supply Chains

Note: HCIS = High Commission for Industrial Security
Source: Saudi Aramco, Team analysis

Fireman Helmet

Value Chain and Key Localization Opportunities



Fireman Helmet

Investment Opportunity and Enablers

Key enablers in KSA to drive success



Financial support: Access to subsidized capital and financial support from SIDF (e.g., WC loans, 'Afaq' program)

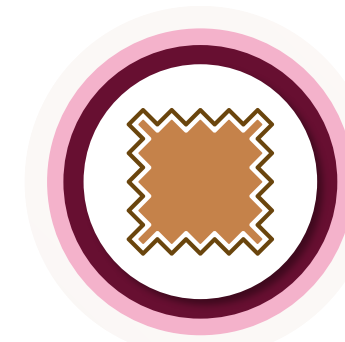


Regulatory incentives: Mandatory local procurement quotas for public and private firefighting needs



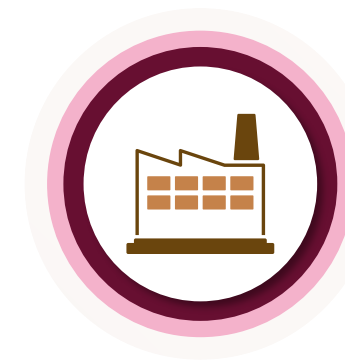
Streamlined licensing: Simplified processes and approvals to encourage new entrants in fire-resistant apparel production

Where is the opportunity



Raw materials

Localize production of thermoplastics and resins for helmets
For SMEs - opportunity to provide raw materials like FRC clothing, glass and fiberglass



Manufacturing

Opportunity to increase localized manufacturing of helmets

Catalyzing Supply Chains

16

Firefighter Boot

Presented by: Ghala Al Hajri

Fireman Boot Opportunity Profile

1

Fireman Boot present an attractive investment opportunity

Type



Structural

2

Fireman Boot market is moderately growing; KSA being major market

9

Estimated 2025 KSA market size. Million USD

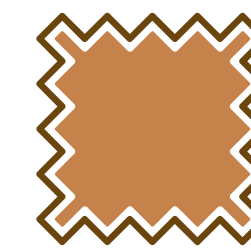
2%

Forecasted 5-year CAGR

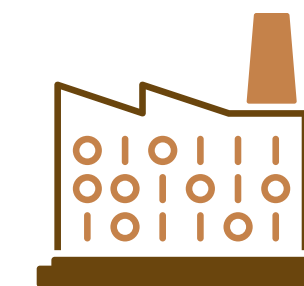
3

Attractive investment opportunities for Fireman Boot value chain

KSA value chain opportunities



Raw materials



Manufacturing

KSA enablers

- Financial support
- Regulatory incentives
- Streamlined licensing

Catalyzing Supply Chains

Fireman Boot

Potential Localized Categories

Type(s)

Structural



Applications

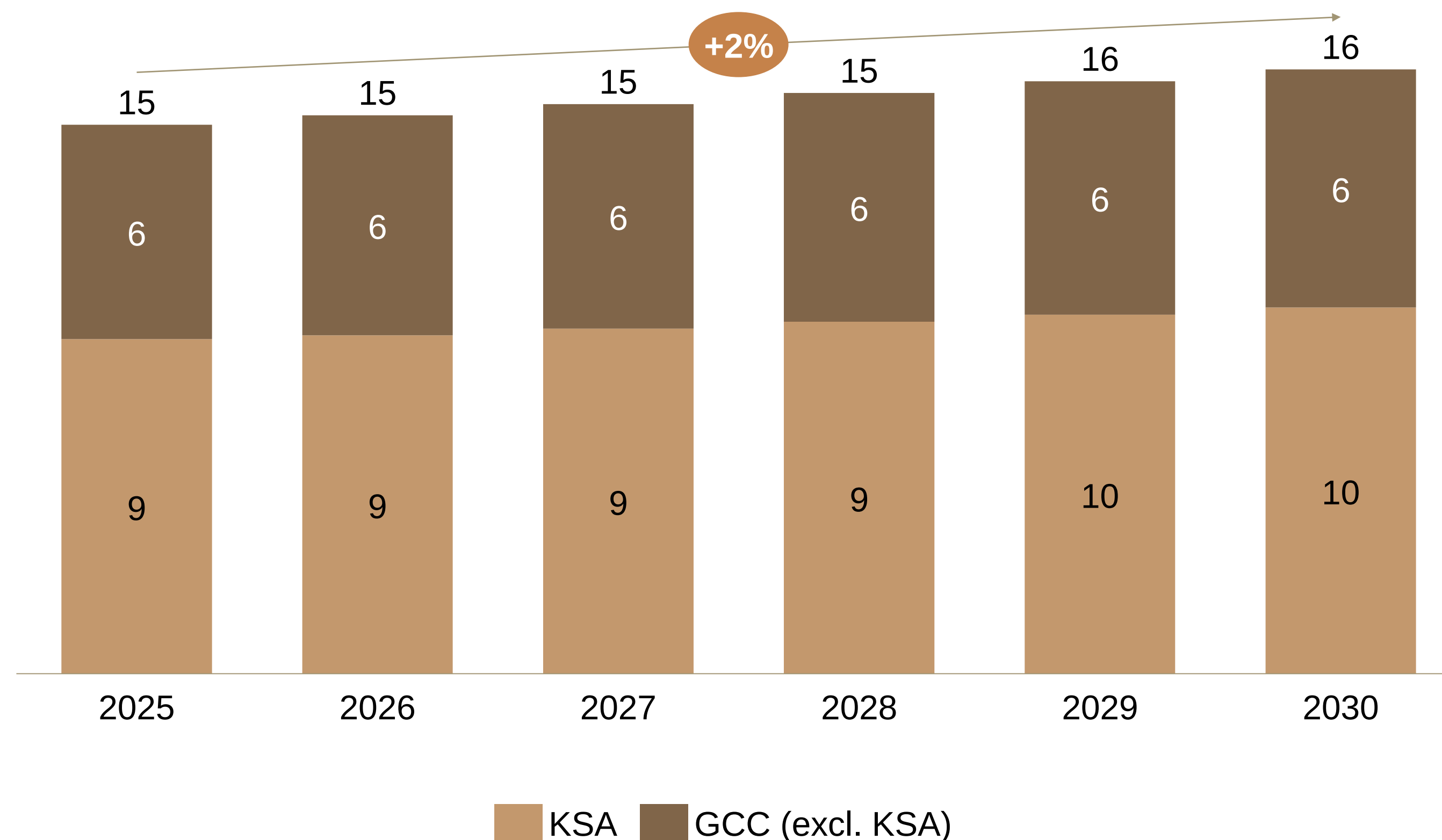
Used by Oil and Gas Industries

Key Technical Specifications:

- 9CAT: **1000788057** (25-50 European Size)
 - Color in Black
 - 14 In Leg Height outer
 - Leather
 - Waterproof Hydrophobic
-
- NFPA 1971 Standard on Protective Ensembles for Structural Fire Fighting and Proximity Fire Fighting

Fireman Boot Demand, Customers & Drivers

Forecasted KSA and rest of GCC Fireman Boot market
2025-2030 (Million USD)



Fireman Boot customers in KSA

-  Government & Civil defense agencies
-  Oil & Gas facilities
-  Industrial, construction, manufacturing facilities

Key KSA demand drivers

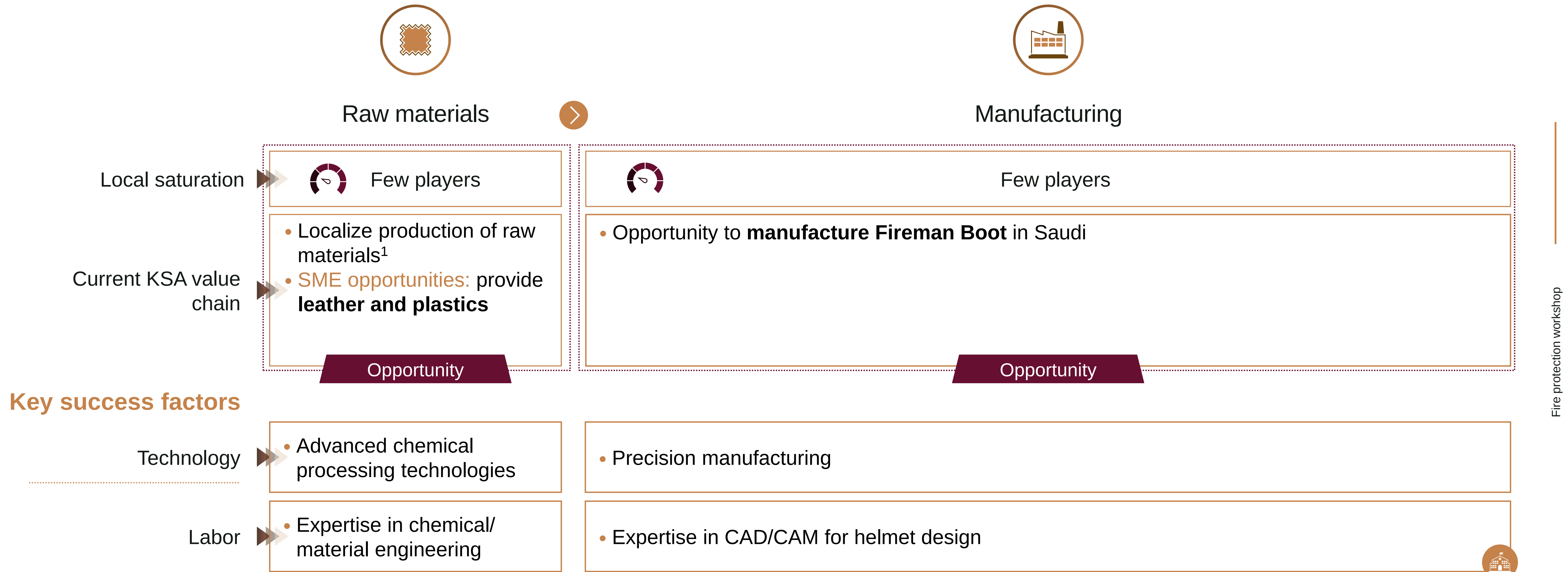
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- **Firm regulations:** HCIS has been granted increased authority to regulate safety policies

Catalyzing Supply Chains

Note: HCIS = High Commission for Industrial Security
Source: Saudi Aramco, Team analysis

Fireman Boot

Value Chain and Key Localization Opportunities



Catalyzing Supply Chains



KSA National training center available

Fireman Boot

Investment Opportunity and Enablers

Key enablers in KSA to drive success



Financial support: Access to subsidized capital and financial support from SIDF (e.g., WC loans, 'Afaq' program)

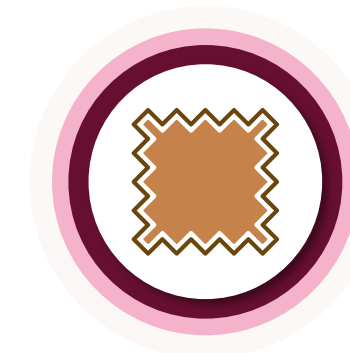


Regulatory incentives: Mandatory local procurement quotas for public and private firefighting needs



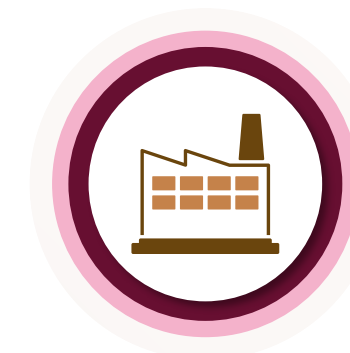
Streamlined licensing: Simplified processes and approvals to encourage new entrants in fire-resistant apparel production

Where is the opportunity



Raw materials

Localize production of specialized fibers¹ for fireman boot
For SMEs - opportunity to provide leather and plastics



Manufacturing

Opportunity to increase localized manufacturing of the boots

Catalyzing Supply Chains

Note: SIDF = Saudi Industrial Development Fund; 1. E.g., flame-resistant leather, Kevlar, rubber compounds, steel or composite toe caps.
Source: Expert inputs; Team analysis

17

Safety Hood

Presented by: Ghala Al Hajri

Safety Hood Opportunity Profile

1

Safety Hood present an attractive investment opportunity

Types



Single-layer



Multi-layer

2

Safety Hood market is moderately growing; KSA being major market

4

Estimated 2025 KSA market size. Million USD

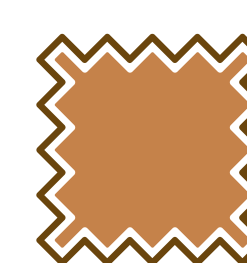
2%

Forecasted 5-year CAGR

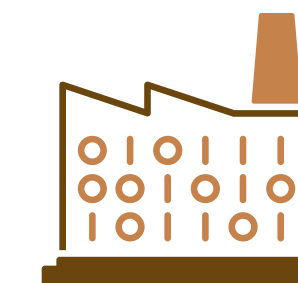
3

Attractive investment opportunities for Safety Hood value chain

KSA value chain opportunities



Raw materials



Manufacturing

KSA enablers

- Financial support
- Regulatory incentives
- Streamlined licensing

Catalyzing Supply Chains

Safety Hood

Potential Localized Categories

Type(s)

Single-layer

Multi-layer

Key Technical Specifications:



Applications

Low-risk firefighting or training

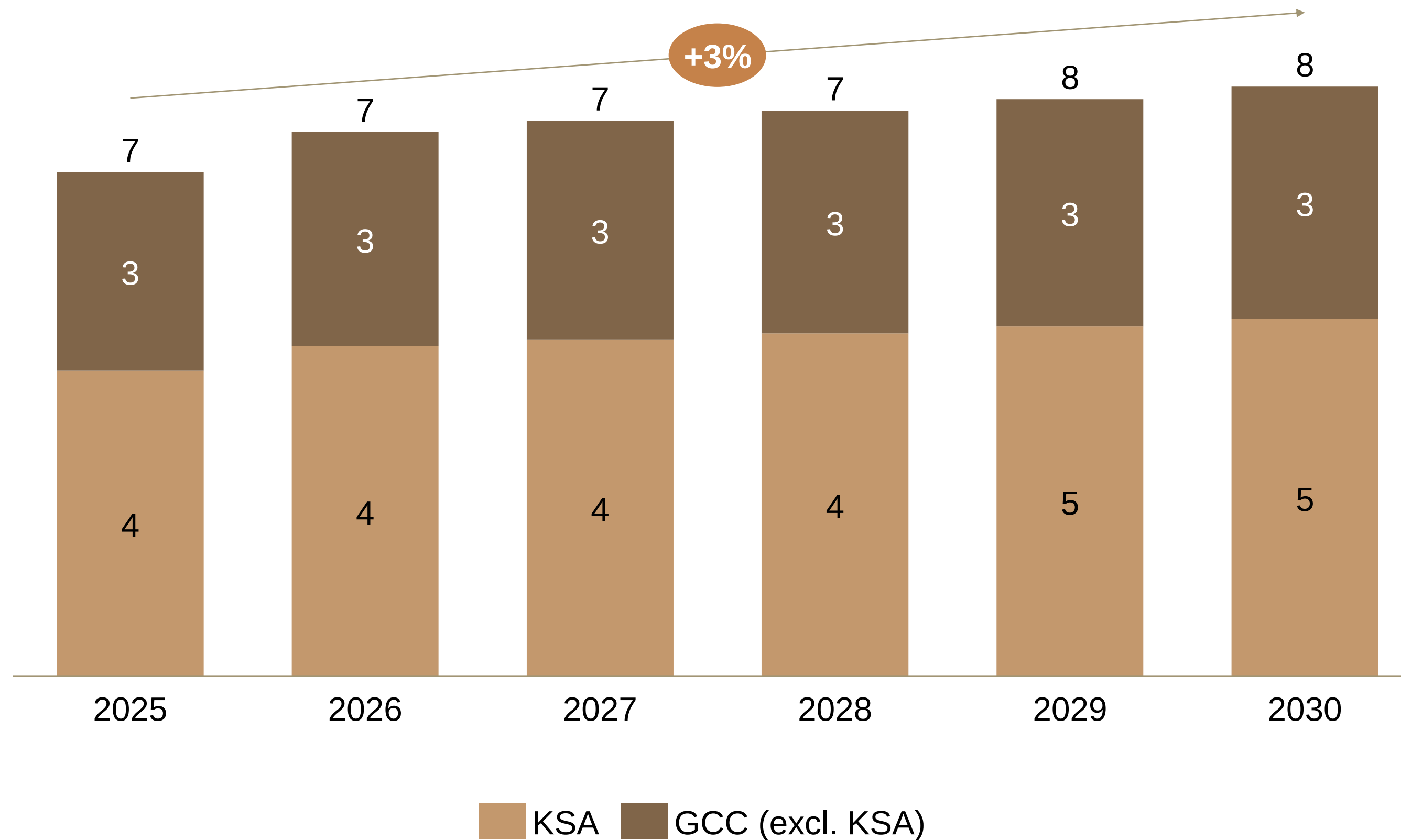
High-heat, prolonged firefighting

- 9CAT: **1000130022** and **1001048906**
 - Color in Tan , Yellow, Black
 - P-84 Rayon/Kevlar Blend Nomex or equal
 - Face opening feature to accommodate any facepiece
-
- UL Certified/Listed or labeled as designed to cover and provide protection to the head
 - NFPA 1971 Standard on Protective Ensembles for Structural Fire Fighting and Proximity Fire Fighting

Catalyzing Supply Chains

Safety Hood Demand, Customers & Drivers

Forecasted KSA and rest of GCC Safety Hood market
2025-2030 (Million USD)



Fireman Safety Hood customers in KSA

-  Government & Civil defense agencies
-  Oil & Gas facilities
-  Industrial, construction, manufacturing facilities

Key KSA demand drivers

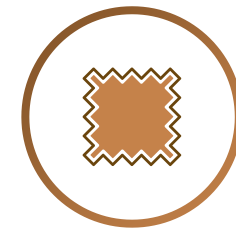
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Catalyzing Supply Chains

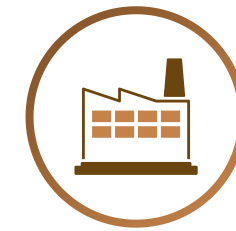
Note: HCIS = High Commission for Industrial Security
Source: Saudi Aramco, Team analysis

Safety Hood

Value Chain and Key Localization Opportunities



Raw materials



Manufacturing

Local saturation



Few players



Few players

Current KSA value chain

- Localize production of raw materials¹, focusing on **fibers and fabrics**
- **SME opportunities:** provide **nomex or equivalent**

Opportunity

- Opportunity to **manufacture safety hoods** in Saudi

Opportunity

Key success factors

Technology

- Advanced polymerization and spinning technologies

- Advanced sewing and assembly techniques

Labor

- Expertise chemical engineering and textile manufacturing

- Expertise in specialized garment manufacturing

Fire protection workshop

Catalyzing Supply Chains



KSA National training center available

1. E.g., aramid fibers, carbon-based fabrics, flame-retardant cotton blends
Source: Expert inputs; Team analysis

Safety Hood

Investment Opportunity and Enablers

Key enablers in KSA to drive success



Financial support: Access to subsidized capital and financial support from SIDF (e.g., WC loans, 'Afaq' program)

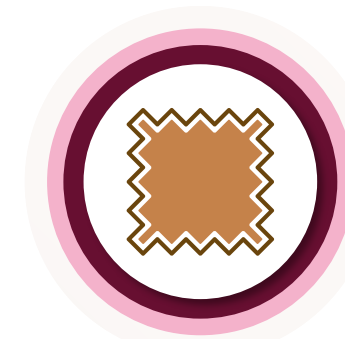


Regulatory incentives: Mandatory local procurement quotas for public and private firefighting needs



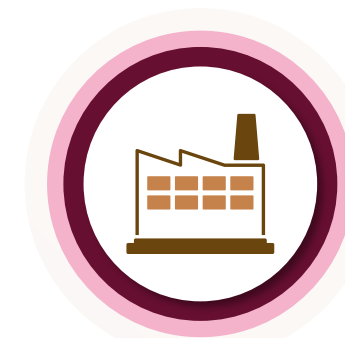
Streamlined licensing: Simplified processes and approvals to encourage new entrants in fire-resistant apparel production

Where is the opportunity



Raw materials

Localize production of specialized fibers and fabrics¹ for safety hoods
For SMEs - opportunity to provide nomex or equivalent



Manufacturing

Opportunity to increase localized manufacturing of safety hood types

Catalyzing Supply Chains

Note: SIDF = Saudi Industrial Development Fund; 1. E.g., aramid fibers, carbon-based fabrics, flame-retardant cotton blends.

Source: Expert inputs; Team analysis

Please direct all inquiries for all Business Opportunities:



We invite you to engage with us and send us your Expression of Interest by scanning the QR code or visiting:

Website: <https://iktva.sa/english/opportunities/opportunity-submission-form>

Email: local-content@Aramco.com

**Thank
You**