Saudi Arabia's Transformation into a Global Logistics Hub: Opportunities and Implementation Challenges under Vision 2030.

Abstract

Vision 2030 commits Saudi Arabia to becoming a global logistics hub that links Asia, Europe and Africa, and it set the goal of raising the country to 25th place in the international Logistics Performance Index. This paper examines what the evidence says about the opportunities that support this ambition and the challenges that stand in the way of implementing it. It is based on a systematic integrative review of 30 refereed journal articles published from 2020 to 2025, two of which anchor the analysis: a spatial optimisation study of regional logistics hubs in the Kingdom and an analysis of Gulf economic diversification with Saudi Arabia as its case. Eighteen articles concern Saudi Arabia or the Gulf directly, and twelve provide international evidence on logistics performance, hub location, connectivity and port competition. The review identifies four groups of opportunity: geography and trade integration, sector-specific hubs for energy, aviation and religious tourism, trade facilitation, and the use of new technology in mobility and logistics. It also identifies four groups of challenge: a persistent gap between target and actual logistics performance in a competitive Gulf region, shortfalls in skills and the matching of national talent to logistics jobs, environmental pressures that rise with logistics activity, and governance and procurement arrangements that are still being reformed. International studies show that infrastructure, connectivity and policy commitment are necessary but not sufficient conditions for hub status. An integrated framework is proposed that relates national endowments, implementation pillars and hub outcomes, with propositions and policy implications for the next phase of Vision 2030.

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1. Introduction

When Saudi Arabia published Vision 2030 in 2016, it built the plan on the country's geographical, financial, social and religious potential, and the development of logistics was among its most prominent goals (Almalki & Alkahtani, 2022). The Kingdom sits between three continents, borders both the Red Sea and the Arabian Gulf, and handles a large share of the

world's energy exports. Converting that position into a role as a global logistics hub would support the wider objective of reducing dependence on hydrocarbon income, which leaves an economy vulnerable when it rests on a single, non-renewable source of revenue (Al Naimi, 2022).

Progress towards the ambition has been uneven. Vision 2030 set a target of 25th place in the Logistics Performance Index, yet the Kingdom's ranking declined until it reached 55th in the report that was current when Almalki and Alkahtani (2022) carried out their study. At the same time, neighbouring states are pursuing similar strategies. A multicriteria assessment of the Gulf Cooperation Council judged the United Arab Emirates to be the member state best placed to host a regional logistics centre (Stojanović & Puška, 2021), and the region's established aviation hubs show what sustained public commitment can achieve (Moreland et al., 2023).

Research on Saudi logistics has grown, but it tends to address individual components such as green logistics, smart mobility, human resources or food supply chains. Studies of logistics hubs elsewhere, from the Belt and Road corridors to ports in Sri Lanka, Pakistan and Namibia, offer lessons that have rarely been drawn together for the Saudi case. The purpose of this paper is to integrate these strands at the level of national strategy. It reviews 30 studies to identify the opportunities that support the hub ambition, the challenges that hinder its implementation, and the policy conditions that international experience suggests are decisive.

The paper concentrates on strategy, policy and institutions. The technological modernisation of individual ports and freight systems is considered only insofar as it bears on national hub competitiveness, so that the analysis remains at the level of the country's position in global networks.

2. Research Objectives and Questions

The paper seeks to establish what the evidence reveals about the opportunities and implementation challenges facing Saudi Arabia's transformation into a global logistics hub under Vision 2030. It has four objectives: (1) to set out the strategic intent and starting position of the hub ambition; (2) to identify, from international research, the determinants of logistics performance and hub competitiveness; (3) to assess the opportunities and challenges that the

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Saudi and Gulf evidence reveals; and (4) to propose a framework that links national endowments, implementation conditions and hub outcomes.

The review addresses three questions. RQ1: Which opportunities support Saudi Arabia's development as a global logistics hub? RQ2: Which challenges constrain the implementation of the hub strategy, and how do they relate to international evidence on hub success? RQ3: Which policy priorities follow for the remaining period of Vision 2030?

3. Approach to the Review

Because the evidence relevant to national hub strategy includes econometric analyses, optimisation models, surveys, Delphi studies, case studies and policy analyses, a systematic integrative review was judged more suitable than a statistical synthesis. The approach keeps selection transparent while allowing qualitative and quantitative findings to be read together and organised into an explanatory framework.

The search was carried out in November 2026 in an open index of scholarly literature, with each candidate record confirmed against its registered metadata. Strategy terms (logistics hub, logistics performance, logistics infrastructure, economic diversification, trade facilitation, connectivity, port competition, regional logistics centre) were combined with setting terms (Saudi Arabia, Kingdom of Saudi Arabia, Gulf Cooperation Council, Vision 2030, Middle East) and, separately, with international hub cases. Records were screened by title and abstract before eligibility was confirmed.

Eligible articles were refereed journal publications in English, whose final publication year fell within the 2020–2025 window, that addressed logistics hubs, logistics performance, diversification, or a sector or institution relevant to Saudi logistics strategy. International studies were included when they offered evidence on the determinants of hub success that could be compared with the Saudi case. Records without an abstract, conference proceedings, opinion pieces and studies on technical port operations were excluded, the last because port digitalisation lies outside the strategic focus of this paper.

The anchor articles were the spatial and optimisation study of regional logistics hubs in Saudi Arabia by Almalki and Alkahtani (2022) and the analysis of economic diversification in the Gulf by Al Naimi (2022). The final corpus of 30 articles includes 18 Saudi or Gulf studies and 12

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international studies. Each article was coded for setting, theme, method and principal findings, and the themes were then grouped into opportunities and challenges. Where a result came from another country, it is presented as comparative evidence. The framework in Section 8 synthesises the reviewed findings and is presented for empirical testing rather than as a validated model; no new primary data were generated.

4. Vision 2030 and the Hub Ambition

Saudi Arabia's diversification has a long history. After the first oil price boom of the 1970s, the government introduced development plans to broaden the economy, and in 2016 it announced Vision 2030 to pursue sustainable growth through diversification, with pillars including human capital, education and non-oil sectors such as tourism (Al Naimi, 2022). Al Naimi concluded, however, that oil prices, budget deficits and the traditional education system would slow the process. Across the Gulf, the energy transition calls for industrial policies that identify new sources of competitive advantage and prioritise local content, skills and knowledge transfer, moving from a rentier towards a more developmental and entrepreneurial approach (Qanas & Sawyer, 2025).

Logistics is one of the sectors through which diversification is to be achieved. Vision 2030 is supported by the National Transport and Logistics Strategy, the National Tourism Strategy and the Saudi Aviation Strategy (Guzman & Navarro-Pineda, 2025), and the hub ambition is linked to giga-projects such as NEOM, a new city planned around artificial intelligence and robotics as part of the country's bid to become a technological hub (Hassan, 2020). Hassan also argued that the move from hydrocarbons towards artificial intelligence is a political as well as an economic project.

The quantitative starting point is set by the Logistics Performance Index. Almalki and Alkahtani (2022) combined geographic information layers with an integer linear programming model to allocate regional logistics hubs in key multi-logistics areas, maximising the number of hubs and minimising their distance to international trading nodes. More than 80 experts from nine countries then assessed the proposal using the survey design of the index, and their responses implied an improvement of about 10% in the overall score and a rise of 20 places. The authors concluded that investment in logistics infrastructure and the index ranking are strongly and positively related. Table 1 lists the Saudi and Gulf studies in the corpus.

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Table 1. Selected Saudi and Gulf studies and their reported results

Study	Focus	Method	Principal finding
Almalki and Alkahtani (2022)	Regional logistics hubs	Spatial analysis, integer programming, expert survey	Proposed hubs estimated to raise the index score by about 10% and the rank by 20 places
Al Naimi (2022)	Gulf economic diversification	Policy analysis	Oil prices, budget deficits and traditional education may slow diversification
Stojanović and Puška (2021)	Gulf logistics performance	CRITIC and MABAC	United Arab Emirates best placed for a regional logistics centre
Barbary (2025)	Trade resilience	Principal components and error correction model	Infrastructure, diversification and digital reforms support trade stability
Khayyat et al. (2024)	Green logistics	Survey, structural equation model	High awareness; gaps in technological readiness and regulation
Alrashedi (2024)	Logistics human resources	DEMATEL with 19 professionals	Education level strongly shapes candidate potential
Guzman and Navarro-Pineda (2025)	Aviation and tourism	Route-specific emissions model	Direct routes cut fuel and emissions by 6% to 80%
Sultan et al. (2025)	Public procurement	Comparative legal and policy review	Large projects exempt from eProcurement; contract alignment issues
Alsuwailem et al. (2021)	Food imports in the pandemic	Statistical hypothesis tests	Significant changes in items and supplying countries

5. What Makes a Logistics Hub: International Evidence

International research helps explain which conditions turn a well-located country into a hub. Three strands are relevant: the economic effects of logistics performance, the role of location and connectivity, and the experience of specialised hubs.

5.1 Logistics Performance, Growth and Sustainability

Logistics performance affects how productive the factors of production are. Using five rounds of the index and a panel of 50 developing economies, Khadim et al. (2021) showed that the elasticities of labour and capital differ significantly by level of logistics performance, which suggests that efficient logistics infrastructure moderates economic growth. Larson (2021) found that higher logistics performance is associated with social well-being, such as population health

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and education, equality, sound governance and a fair distribution of income, but also with harmful emissions.

The environmental cost is confirmed by Magazzino et al. (2021). In a panel of the 25 top-ranked logistics countries, technological innovation, human development, urbanisation and trade openness raised logistics performance, while higher performance had a large positive effect on carbon emissions and was also found to worsen economic growth. These findings caution against treating a higher ranking as an end in itself. They also show that the drivers of logistics performance extend well beyond physical infrastructure: openness to trade and human development appear among the significant determinants, which places education, institutions and trade policy within the scope of logistics strategy. For the Gulf, Stojanović and Puška (2021) applied the CRITIC and MABAC methods to index data and showed in which logistics areas each member state, including Saudi Arabia, needs to improve.

5.2 Location, Connectivity and Corridors

Hub status depends on the networks in which a location is embedded. Akhavan et al. (2020) proposed a classification of European cities according to their connectivity through advanced logistics services, measured with an interlocking network model, and analysed the variables that explain each city's score. Along the Belt and Road, Lee et al. (2022) identified eight strategic locations for global logistics distribution centres from a Chinese perspective, including the Middle East, taking account of trade blocks, maritime routes, overseas port investments, rail services, trade conflicts and the effects of the pandemic. Their analysis implies that Saudi Arabia competes for a role within corridors designed by others as well as for its own.

Port and corridor cases show how location advantages are realised or lost. Gholizadeh et al. (2020) argued that Gwadar Port could strengthen the economic security of China and Pakistan by providing a route for Middle Eastern oil and for goods from Central Asia, Europe and the United States, while reducing Pakistan's reliance on Karachi. In Sri Lanka, Kavirathna et al. (2021) found that Colombo was attractive for domestic cargo and Hambantota for transshipment, and examined how slot capacity, inland infrastructure, port charges and efficiency shape competition between the two. Jiang et al. (2020) showed that in multimodal networks, inland transport cost, inland transit time and customs clearance time matter more to shippers than in road transport, and that reliability and large shipment sizes favour multimodal routes.

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Weak connectivity can undermine a hub strategy. In Namibia, Tshoopara and Mbhele (2024) found a fragmented railway, heavy reliance on road transport and low intermodality, which limited the functionality of the national logistics hub. A Delphi study of border and maritime logistics hubs by Jafarpour Ghalehteimouri et al. (2025) emphasised that the public agencies, carriers, shipping lines, customs authorities and traders involved in a hub pursue different objectives, and that their actions shape the performance of such hubs.

5.3 Specialised Hubs: Energy and Aviation

Specialised hubs build on particular assets. Hammad et al. (2021) reviewed 36 papers and proposed a framework for setting up and running a global energy logistics hub, particularly oil and gas, arguing that such a hub can act as a bridge between supplying and consuming countries and reduce the effect of obstructions along transit paths. For aviation, Moreland et al. (2023) examined the three leading Middle Eastern hubs through the lens of national competitive advantage and found that geography, infrastructure and business attractiveness are important but do not guarantee hub status unless governments are committed to developing the sector. Both studies point to policy commitment as a decisive ingredient. A further lesson is that specialised hubs depend on the coordinated behaviour of many actors. In the energy case, Hammad et al. identified separate determinants for each player in the supply chain, from supplying to consuming countries, so that a hub cannot be created by infrastructure investment in one country alone.

6. Opportunities for Saudi Arabia

The Saudi and Gulf studies, read against the international evidence, reveal four groups of opportunity. Table 2, presented with the synthesis in Section 7, sets them alongside the corresponding challenges.

6.1 Geography and Trade Integration

The Kingdom's location between major markets is its most obvious asset, and the regional hubs proposed by Almalki and Alkahtani (2022) are designed to exploit it by connecting domestic logistics areas to international trading nodes. Trade integration also supports resilience. Barbary (2025) found that, although oil prices continue to influence Saudi trade flows, logistics infrastructure investment, a more diversified trade structure and reforms that digitalise supply

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chains contribute more to stability, and geopolitical shocks such as the trade war between the United States and China and the conflict in Ukraine have had limited long-term effects because of the country's strong integration into global trade.

New alignments have uncertain value. Analysing trade with the BRICS countries from 2003 to 2022, Barbary (2024) found no significant relationship between the Saudi trade balance and trade with the bloc, implying that accession would have limited effects on exports without further negotiation of mutual obligations. Belt and Road planning, which identifies the Middle East as a strategic location for distribution centres (Lee et al., 2022), offers a more direct route to hub traffic, provided that Saudi locations can compete with alternatives in the region.

6.2 Sector-Specific Hubs

Saudi Arabia's endowments support several specialised hub roles. Its position in energy markets aligns with the requirements for a global logistics energy hub (Hammad et al., 2021). Aviation offers a second avenue, linked to tourism. Guzman and Navarro-Pineda (2025) showed that tourism and aviation strategies risk increasing greenhouse gas emissions, and, using a route between Saudi Arabia and Australia as a demonstration, found that direct point-to-point flights could reduce congestion, fuel consumption and emissions by between 6% and 80% compared with hub-and-spoke routings, depending on route and aircraft.

Religious tourism creates a third, distinctive logistics task. Paché (2023) noted that accommodating millions of pilgrims within a small urban area over only a few days of the Hajj creates enormous logistical challenges, including the growth of pilgrim flows and the need for crowd control to prevent stampedes, and that these logistical dimensions have received little research attention. Expertise developed in managing such peaks of demand is a capability on which the wider logistics sector can draw. Pilgrimage logistics also links the hub ambition to the tourism strategy, since the same airports, roads and urban distribution systems must accommodate both religious visitors and the leisure tourism that Vision 2030 seeks to expand (Guzman & Navarro-Pineda, 2025).

6.3 Trade Facilitation and Digital Government

Reducing time at borders is among the most cost-effective ways to improve hub competitiveness. Drawing on indicators of implementation of the Trade Facilitation Agreement in 160 countries,

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de Melo et al. (2025) estimated that realistic implementation could shorten customs time by 3.7 days for imports and 1.9 days for exports; translated into trade costs, this is equivalent to a tariff cut of 3.5% to 7% on imports, together with export growth of about 8%. Although their focus was the African Continental Free Trade Area, the mechanism applies to any hub aspirant, and it complements the finding that customs clearance time influences shippers' route choices (Jiang et al., 2020).

Digitalisation of government processes supports the same objective. Saudi Arabia's eProcurement system aims to increase transparency, clarify purchasing methods and build trust through better governance of tenders and government purchases (Sultan et al., 2025). In mobility, Alanazi (2023) benchmarked the Kingdom against South Korea, Singapore and Japan using 60 indicators and concluded that Saudi Arabia could join these leaders through inclusive development, standardisation and policy-driven strategies, with commitments to collaboration among public, private and research actors.

6.4 Technology, Sustainability and New Industries

Technology and the energy transition open further opportunities. NEOM is intended to integrate artificial intelligence and robotics into urban life as a source of future revenue (Hassan, 2020). Investment in renewable energy has increased output and employment and reduced emissions, with each SAR 1 billion invested in renewables associated with a rise of 0.2% in national output, 500 to 700 jobs and a reduction of 0.15 million tonnes of carbon dioxide equivalent (Muneer et al., 2025). Yusuf and Lytras (2023) argued that the circular carbon economy model, combined with digitalisation, can make sustainability a competitive feature for Saudi companies. For a logistics hub, low-carbon energy and digital capability can become selling points for shippers that face their own decarbonisation commitments.

7. Implementation Challenges

Opportunities are matched by challenges that the studies identify in four areas. Their relationship with the opportunities is summarised in Table 2.

Table 2. Opportunities, corresponding challenges and policy levers

Area	Opportunity	Challenge	Policy lever

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Area	Opportunity	Challenge	Policy lever
Position and trade	Location between continents; strong trade integration	Rank well below target; strong regional competitor	Trade facilitation, connectivity and service quality
Specialised hubs	Energy, aviation and religious tourism assets	Aviation emissions; peak-demand logistics	Low-carbon routing; Hajj logistics capability
Institutions and digital government	eProcurement; smart mobility benchmarks	Exemptions for large projects; contract alignment	Extend eProcurement; standardise and collaborate
People	Saudization and a shift in attitudes to vocational training	Talent matching and education quality	Logistics-specific training and assessment
Sustainability	Renewable energy and circular carbon economy	Emissions rise with logistics activity	Green logistics regulation and incentives

Figure 1 combines the starting position of the hub strategy with the composition of the evidence. The left panel shows the gap between the target in the index and the ranking reported by Almalki and Alkahtani (2022), together with the improvement estimated for their hub proposal. The right panel shows how the corpus is distributed across themes and between Saudi or Gulf and international settings.

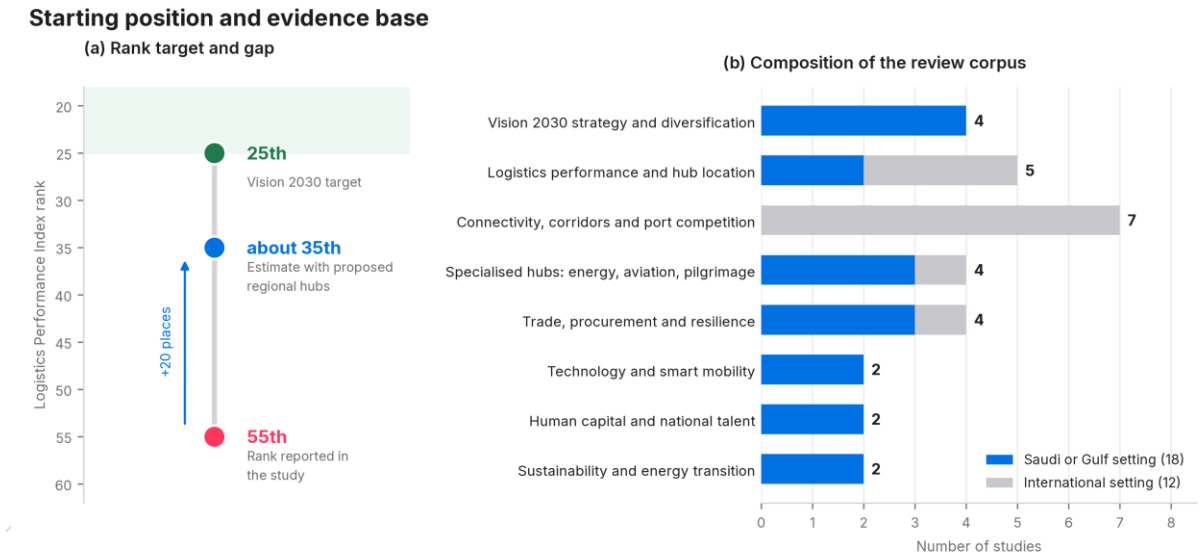


Figure 1. Starting position and evidence base: (a) Logistics Performance Index rank target, reported rank and modelled improvement, as reported by Almalki and Alkahtani (2022); (b) thematic and geographical composition of the review corpus (author's coding).

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7.1 The Performance Gap and Regional Competition

The most visible challenge is the distance between ambition and measured performance. Even the estimated gain of 20 places from the proposed hub network would leave the Kingdom short of 25th place (Almalki & Alkahtani, 2022), so further improvement must come from elements of performance beyond the location of hubs, such as customs, tracking and timeliness. Regional competition compounds the task, since the United Arab Emirates was assessed as having the best conditions for a regional logistics centre in the Gulf (Stojanović & Puška, 2021). The aviation evidence suggests that late entrants can still succeed when governments commit to the sector consistently (Moreland et al., 2023).

7.2 Human Capital and Saudization

A hub requires a large, skilled workforce. Saudi logistics companies are now focusing on hiring national talent to reduce dependence on expatriates, but they face difficulties in matching available candidates with the requirements of specific jobs; a DEMATEL analysis of evaluations by 19 human resource professionals found that the level of education strongly affects candidates' potential and future development (Alrashedi, 2024). Technical and vocational education has traditionally carried a stigma in favour of white-collar jobs, although attitudes are shifting as Vision 2030 increases the importance of skilled labour, and a survey of 1,007 students related perceptions of such training to gender, family income and parental education (Aldossari, 2020). These findings echo the concern that the traditional educational system could slow diversification (Al Naimi, 2022).

7.3 Environmental Pressures

Logistics growth tends to raise emissions (Larson, 2021; Magazzino et al., 2021), and the Kingdom was chosen as a case for green logistics research precisely because of its rapid logistics development and significant carbon dioxide emissions (Khayyat et al., 2024). The survey by Khayyat et al. found high environmental awareness and supportive organisational cultures among stakeholders, but room for improvement in technological readiness, a need for clearer regulation and stronger policy support, and complex financial considerations involving large initial investments. Aviation growth linked to tourism could increase emissions if not managed (Guzman & Navarro-Pineda, 2025), and Yusuf and Lytras (2023) noted that the temporary fall in

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emissions during the pandemic required preparation for a rebound. Muneer et al. (2025) also found that construction phases of renewable projects increase emissions temporarily.

7.4 Governance, Procurement and Resilience

Institutional reform is still in progress. Sultan et al. (2025) found that the new model contract for public works had faced challenges because it was not aligned with best practices and sustainability considerations, and that many large projects remain exempt from the eProcurement system, which hinders sustainable development goals. Since hub infrastructure is procured largely through public contracts, these issues bear directly on cost, quality and delivery time.

Resilience is a further test. During the pandemic, Saudi food imports changed significantly in both the items shipped and the supplying countries, with most item groups and most countries showing reductions (Alsuwailem et al., 2021). A hub that serves others must keep functioning during such disruptions, and the finding by Barbary (2025) that infrastructure and diversification support stability suggests that resilience and hub development can reinforce each other if planned together. Coordinating the many stakeholders of a hub, each with its own objectives (Jafarpour Ghalehteimouri et al., 2025), is a governance task in its own right. International experience reinforces the point. Fragmented rail systems and low intermodality limited the Namibian hub (Tshoopara & Mbhele, 2024), and competition between Colombo and Hambantota showed that port charges, slot capacity and inland links decide which facility attracts which traffic (Kavirathna et al., 2021). For Saudi Arabia, connecting ports on the Red Sea and the Arabian Gulf with inland logistics zones and with each other is therefore a coordination challenge as much as a construction programme.

8. An Integrated Framework for Hub Transformation

Figure 2 presents a framework that organises the findings in three tiers. The foundation consists of national endowments: location between continents and on two seas, energy resources, fiscal capacity and the flows of religious tourism. The middle tier contains five implementation pillars: infrastructure and intermodal connectivity; trade facilitation and digital government; human capital and national talent; sustainability and the energy transition; and governance, procurement and coordination. Each pillar carries the specific challenges identified in Section 7. The top tier

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contains hub outcomes: improved logistics performance, specialised hub roles, resilient trade flows and diversified growth.

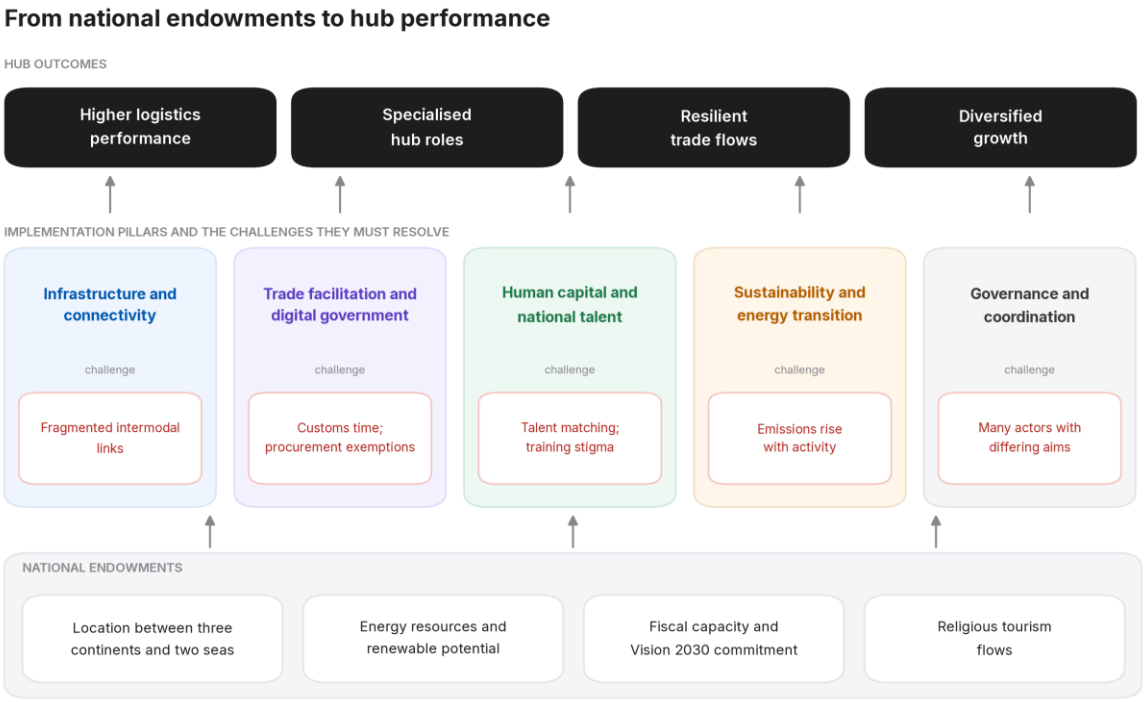


Figure 2. Integrated framework for Saudi Arabia's transformation into a global logistics hub.

Four propositions are derived. P1: Improvements in Saudi logistics performance will depend more on trade facilitation, connectivity and service quality than on the number of hub locations, because location alone cannot close the gap to the target. P2: Specialised hub roles in energy, aviation and religious tourism will develop faster than a general-purpose hub because they build on existing national endowments. P3: Progress in national talent development will moderate the speed at which hub capacity becomes hub performance. P4: Integrating decarbonisation into hub development will strengthen, rather than weaken, competitiveness as shippers and airlines face stricter emissions requirements.

The framework differs from generic models of hub location in emphasising implementation conditions. International studies show that infrastructure, location and connectivity are necessary, but that policy commitment, stakeholder coordination and intermodal integration

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determine whether these assets produce hub status (Moreland et al., 2023; Tshoopara & Mbhele, 2024). The framework places these conditions at its centre.

9. Discussion and Policy Implications

The review suggests that Saudi Arabia's hub ambition is supported by real opportunities but faces implementation challenges that are typical of late entrants to an established regional market. Three policy priorities follow. The first is to treat trade facilitation as a lead instrument. Reducing customs time has large estimated trade effects (de Melo et al., 2025), affects shippers' route choice (Jiang et al., 2020) and is less capital-intensive than new infrastructure.

The second priority is to align education and workforce policy with logistics demand. Matching national talent to specific logistics roles (Alrashedi, 2024) and continuing to improve the standing of technical and vocational training (Aldossari, 2020) would reduce the risk that new capacity is underused. Industrial policies that emphasise local content, skills and knowledge transfer (Qanas & Sawyer, 2025) provide a framework within which logistics training can be planned.

The third priority is to integrate sustainability with hub strategy. Since logistics growth raises emissions (Magazzino et al., 2021), clear green logistics regulation and policy support (Khayyat et al., 2024), renewable energy investment (Muneer et al., 2025) and routing choices in aviation (Guzman & Navarro-Pineda, 2025) can help the Kingdom offer low-carbon logistics as a competitive advantage. Procurement reform that extends eProcurement to large projects and aligns contracts with best practice (Sultan et al., 2025) would support all three priorities.

The evidence also bears on the choice between a general-purpose hub and a portfolio of specialised roles. A general-purpose hub competes directly with established regional centres, which the Gulf assessment suggests are better placed at present (Stojanović & Puška, 2021). Specialised roles in energy logistics, pilgrimage and tourism flows, and corridor services linked to the Belt and Road (Hammad et al., 2021; Lee et al., 2022; Paché, 2023) build on assets that competitors cannot easily replicate. A sequenced strategy that consolidates these niches while improving trade facilitation and connectivity may therefore close the performance gap more reliably than an attempt to match competitors across every segment at once.

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Resilience should be part of this calculation. The pandemic altered both the goods that Saudi Arabia imported and the countries that supplied them (Alsuwailem et al., 2021), while diversified trade and logistics investment have supported stability in the face of geopolitical shocks (Barbary, 2025). A hub strategy that adds alternative routes, storage and multimodal options serves both the commercial goal of attracting traffic and the national goal of securing supply. These priorities do not diminish the importance of physical infrastructure. They suggest, however, that infrastructure will yield returns in hub performance only when it is connected through intermodal links, staffed by a capable workforce, cleared efficiently at borders and governed through coordinated institutions. Monitoring should follow the same logic. Progress could be tracked not only through the overall index rank but also through its components, such as customs efficiency, timeliness and tracking, and through indicators of workforce development and emissions intensity, so that the pillars of Figure 2 can be evaluated separately. Such a dashboard would make it easier to identify which pillar is limiting performance at any point and to adjust investment accordingly.

10. Limitations

The review has several limitations. Refereed research on Saudi logistics strategy remains limited, so several Saudi studies rely on surveys, small expert panels or policy analysis, and international evidence was used to fill the gaps. Some international findings, such as those on Namibia, Sri Lanka or African trade facilitation, may not transfer directly to the Gulf. The ranking data in Figure 1 are those reported by Almalki and Alkahtani (2022) and do not include later editions of the index. The thematic coding involved judgement, and the selection, limited to 30 articles from 2020 to 2025, cannot capture all relevant work. Future research could test the propositions with longitudinal data on Saudi logistics performance, firm-level studies of hub users, and evaluations of trade facilitation and workforce programmes.

11. Conclusion

Saudi Arabia's ambition to become a global logistics hub rests on genuine advantages of location, energy, capital and religious tourism, and is supported by strategies for transport, logistics, aviation and tourism. The evidence reviewed here shows that these opportunities are accompanied by a performance gap in a competitive region, shortfalls in matching national talent to logistics roles, rising environmental pressures and governance reforms that remain incomplete.

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International experience indicates that location and infrastructure must be complemented by connectivity, trade facilitation and sustained policy commitment. The proposed framework and propositions offer a structure for evaluating the next phase of Vision 2030 and for directing investment towards the conditions that convert national assets into hub performance.

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