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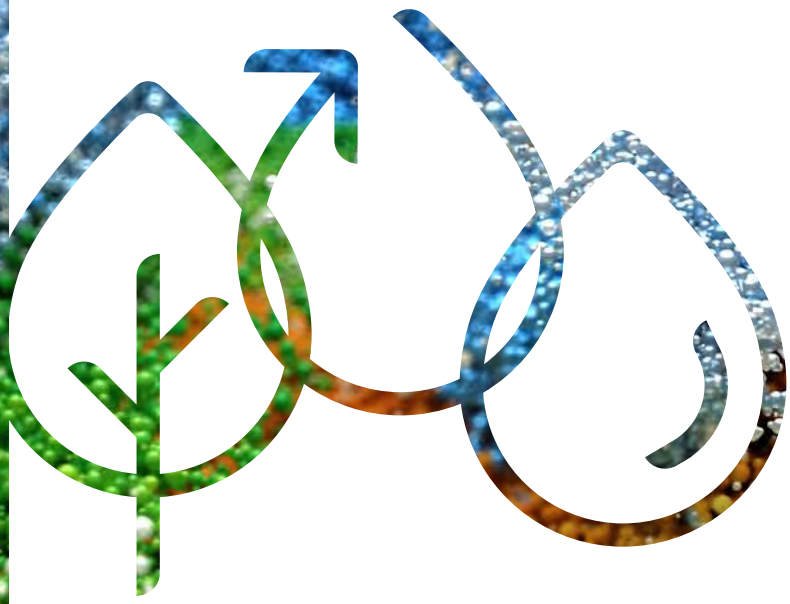
Industry Report

Pioneering waste management, recycling and water management solutions across the Middle East & North Africa



Resource Intelligence: Waste, Water & Circular Markets

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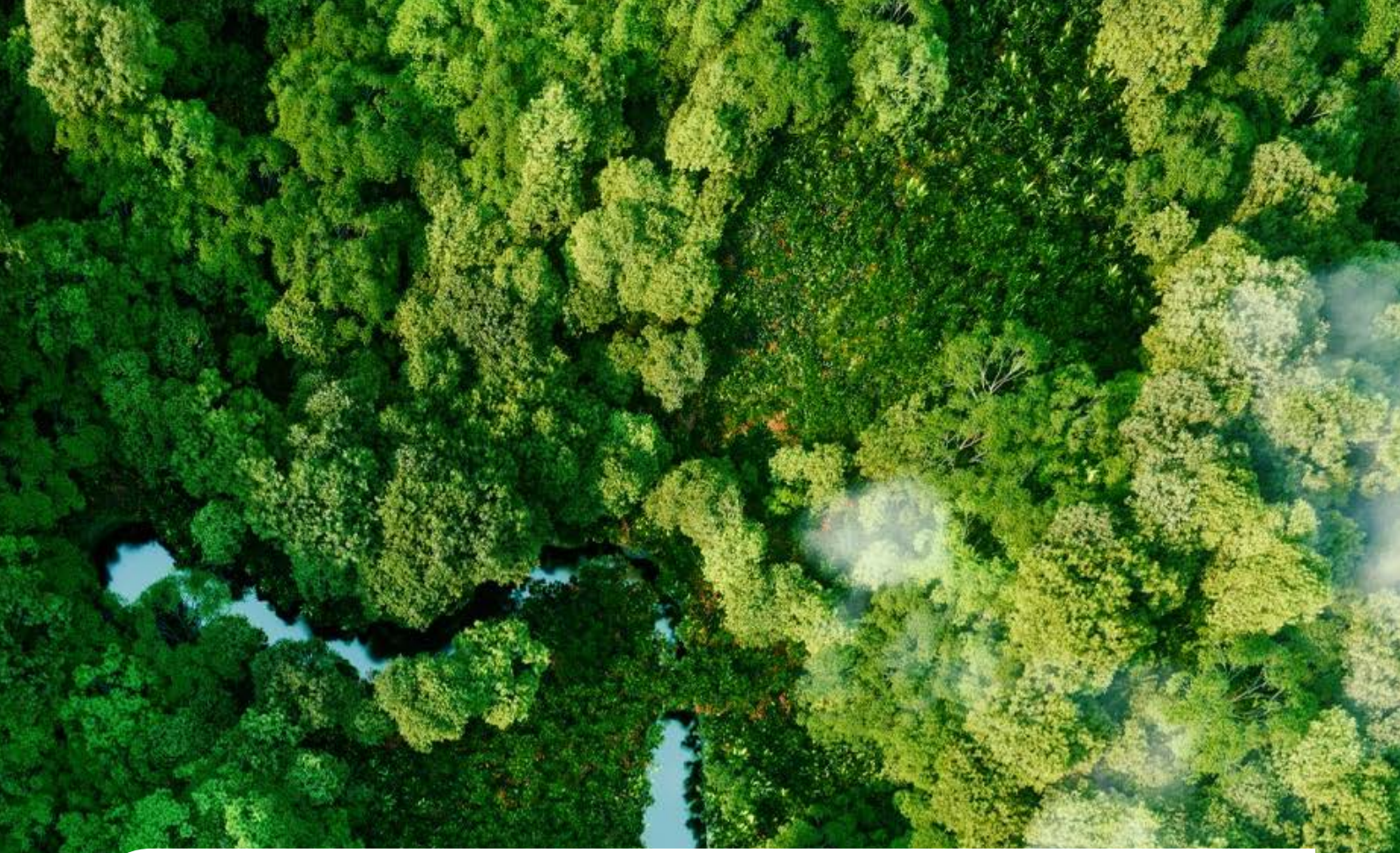
Founding and Strategic Partner:

MWAN مـــوان
المركز الوطني لإدارة النفايات
National Center for Waste Management

IFAT Saudi Arabia



Introduction

An important element within Saudi Arabia's Vision 2030 is environmental sustainability and this ethos has threaded its way through all the major projects across the country, becoming part of the country's transformation journey. Vision 2030 is the Kingdom's comprehensive framework aimed at diversifying its economy – part of which includes implementing sustainable development practices across various sectors.

One of the cornerstones of this journey is the Saudi Green Initiative (SGI) which was launched in 2021. The aims of SGI include combatting climate change, improving quality of life and protecting the environment for future generations. SGI has a range of key objectives, which include achieving net-zero emissions by 2060, reducing carbon emissions by 278 million tonnes per annum by 2030[1] and increasing the Kingdom's reliance on clean energy sources. To date, more than 85 initiatives have been activated by SGI, representing an investment exceeding $188 billion[2]. It's worth noting that all of this signals the Kingdom's ambition to lead the region in carbon reduction and green investment. These targets also present a concrete opportunity for international partnerships in a variety of sectors like clean tech, circular economy solutions and smart environmental services.

In close alignment with these environmental initiatives, Saudi Arabia is making significant strides in water and waste management efforts. The Kingdom is now one of the largest producers of desalinated water, with approximately 50% of its drinking water sourced from desalination processes[3]. Additionally, the National Water Strategy 2030 has outlined an $80 billion investment[3] plan to enhance water sustainability and infrastructure. Looking at the waste management sector, the government has set ambitious targets it's working to achieve, including diverting 90% of waste generated from landfills by 2040[4] and establishing more than 1,300 disposal and recycling companies by 2035[5].

All these efforts have created a growing market for environmental technologies and solutions, all of which are attracting global attention and lucrative opportunities.

Source: [1] Saudi & Middle East Green Initiatives | [2] Fast Company Middle East | [3] Arab News | [4] National Center for Waste Management | [5] AHK

01.

Investment landscape & current market

Investment landscape & current market

01.

Saudi Arabia is emerging as a global centre for environmental innovation. Driven by the goals of Vision 2030, the Kingdom is investing heavily in sustainable infrastructure, with water and waste management taking centre stage. This has positioned the country as a hub for environmental innovation and infrastructure development.

Water sector investments

Recognising the importance of water security, the Saudi government has allocated more than $80 billion towards the development of key water projects[1]. This investment aims to enhance access to safe and affordable drinking water, improve sanitation services and support the Kingdom's growing population as well as its industrial sectors.

The National Water Strategy 2030 outlines a comprehensive plan to address water scarcity through initiatives such as enhancing desalination capacity, improving water distribution networks, reusing wastewater, promoting water conservation practices, among further goals.

These efforts are aligned with the United Nations Sustainable Development Goals (SDGs), particularly Goal 6, which focuses on ensuring access to water and sanitation for all.

Some key initiatives to note:

- The Ministry of Environment, Water and Agriculture (MEWA) plans to meet 90% of the Kingdom's water demand[2] using desalinated water by 2030. This has led to the development of new desalination plants in the country.
- The Qatrah awareness programme[3], launched by MEWA in 2019[4], aims to reduce daily per capita water consumption by nearly half by 2030 through public awareness campaigns.
- As recently as April 2025, Saudi Arabia has rolled out $533 million in water and sewerage projects[5] across the Riyadh region, aligning with Vision 2030's objectives to enhance infrastructure and quality of life.

Source: [1] Arab News | [2] The International Trade Administration | [3] Red Sea Global | [4] maee center | [5] Arab News

Investment landscape & current market

01.

Waste management initiatives

In parallel, Saudi Arabia is tackling the challenges of waste management. Currently, the Kingdom generates more than 110 million tonnes of waste annually, with a significant portion originating from major cities like Riyadh, Jeddah, and Dammam[1].

The National Center for Waste Management (MWAN) has set a goal to treat 106 million tonnes[2] of waste by 2035, while aiming to divert 90% of waste from landfills by 2040[3]. According to the Oxford Business Group, MWAN's master plan also accounts for a portfolio of investment opportunities in the Kingdom.

According to the Ministry of Environment, Water and Agriculture's (MEWA) annual report released in January 2024, there are plans to increase the Kingdom's recycling rate to 95%, up from 3-4%[4]. The Saudi Investment Recycling Company (SIRC) is also focused on this goal, working on several waste-to-energy projects across the Kingdom. One of the major projects launched recently was a waste-to-fuel plant[5] that went live in July 2024 and was developed in collaboration with German firm MVW Lechtenberg and Norwegian blockchain provider Empower. This is set to process approximately 3m tonnes of municipal waste across six governorates to produce refuse-derived fuels (RDF).

Strategic importance of the Saudi market

The crucial nature of addressing environmental challenges in Saudi Arabia cannot be overstated as there has been an intensified demand for sustainable water and waste management solutions. A combination of both environmental needs and industrial ambitions have made the Kingdom's environmental services market one of the most attractive in the Middle East and North Africa.

These are the key drivers behind these developments:

- Rapid urbanisation: According to the Journal of Future Studies, nearly 84% of the Kingdom's population lives in cities, therefore the demand for infrastructure is growing.
- Environmental pressure: More than 110 million tonnes of waste is generated annually, with water scarcity growing
- Policy support: There has been a strong alignment with Vision 2030 and the Saudi Green Initiative across the sector, along with the implementation of comprehensive water laws and waste management regulations
- Private sector engagement: Government enabling Public-Private Partnerships (PPP) and FDI incentives.

Source: [1] The International Trade Administration | [2] Arab News | [3] National Center for Waste Management | [4] Saudi Press Agency | [5] Zawya

Investment landscape & current market

01.

Saudi Arabia's commitment to a green economy therefore presents vast opportunities for innovation and international collaboration. Global and regional companies are being attracted to the Kingdom to contribute to its sustainability objectives – added to which, Saudi Arabia has been fostering a conducive environment for public-private partnerships.

Moreover, Saudi Arabia's strategic geographic location serves as a gateway to the broader Middle East and North Africa (MENA) region. This enhances its potential as a regional leader in environmental technologies and sustainable practices, thereby offering a platform for companies to expand their reach and impact.

The substantial investments and strategic initiatives in Saudi Arabia's water and waste management sectors address pressing domestic challenges but also position Saudi Arabia as an attractive market for international stakeholders committed to sustainable development.

Key stakeholders

Saudi Arabia's transformation is backed by a dynamic ecosystem of public and private entities.

Government & regulatory authorities:

- Ministry of Environment, Water & Agriculture (MEWA)
- National Center for Waste Management (MWAN)
- National Water Company (NWC)
- Saudi Water Authority (SWA)
- Public Investment Fund (PIF)
- Saudi Investment Recycling Company (SIRC)
- The Saudi Water Partnership Company (SWPC)
- National Water Works Co (NWWC)

Water treatment & desalination:

- Metito
- Biwater
- AES Arabia Ltd
- ACWA Power
- Miahona
- WETICO
- Solenis
- REDA Water
- Ecolab

Waste management and circular economy specialists:

- Veolia
- SUEZ
- Emvees Environmental Services
- Bechtel
- TotalEnergies & EDF Renewables

Engineering, infrastructure & smart solutions:

- Jacobs
- Bechtel
- Almar Water Solutions
- BASF
- Al Jazira Water Treatment Chemicals

02.

Current Projects & Industry Opportunities

Current Projects & Industry Opportunities

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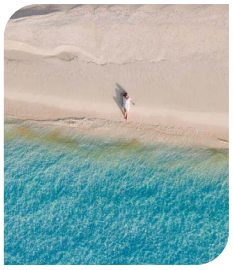
As much as Saudi Arabia's giga and mega projects are real estate and infrastructure feats, they are also creating demand for the best environmental technologies and services – and are ultimately aiming to be hailed as model cities for sustainability.

These developments align with Vision 2030 and aim to utilise and benefit from the highest global standards of sustainability – you will find environmental technologies, circular economy models and clean infrastructure at their core.

Projects to take note of:

NEOM:

A $500 billion city that is being designed to operate on 100% renewable energy and achieve zero waste. It features plans for a fully integrated circular economy, including circular water supply.



The Red Sea Project:

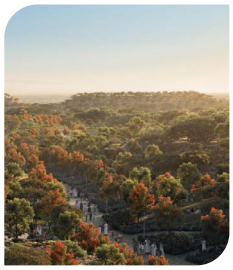
Spanning over 28,000 square kilometres, this project includes goals such as 100% reliance on renewable energy, as well as achieving zero waste to landfill.

AMAALA:

Committed to be being powered by renewable energy, with a focus on marine conservation and water use. Designed with integrated waste management system, which which focus on recycling and reuse.

Diriyah Gate:

Focusing on cultural heritage, this project has incorporated sustainable urban planning, with initiatives focused on water conservation and energy efficiency. It's also a 100% walkable city.



King Salman Park:

Covering 16 square kilometres in Riyadh, this park – in addition to conserving biodiversity – will use sustainable irrigation and water recycling systems as well as energy-efficient systems.

ROSHN Residential Communities:

Backed by the Public Investment Fund (PIF), these residences focus on green community planning, which includes integrated waste management systems, energy-efficient buildings, and more.

Current Projects & Industry Opportunities

02.

Waste projects:

Riyadh Construction and Demolition (C&D) Waste Recycling Facility:

This facility in Al Khair is meant to process C&D waste and achieve approximately 90% recycling efficiency.It features plans for a fully integrated circular economy, including circular water supply[1].

FAS Energy 10 MW Waste-to-Energy Pilot:

Located in North-East Riyadh, this is a SAR 131 million pilot that will convert municipal waste into clean electricity[3].

Riyadh Cement Waste-Heat-to-Energy Plant:

This SAR 130.5 million plant will harness industrial heat to generate 12.6 MW power[5].

MVW–SIRC–Empower Waste-to-Fuel Plant:

This project will process approximately 3mn tonnes of municipal solid waste across dix governorates, some of which will be converted to RDF[2].

Reviva JIP Waste Management & Recycling Site:

Located at Jeddah Islamic Port, the facility will handle solid and non-compliant waste directly at the port[4].

RDF & Tire Recycling JV (SIRC–EIG):

This is a two-phase SAR 2.34 billion project that will produce refuse-derived fuel (RDF) and tire-oil[6].

Source: [1] The Saudi Investment Recycling Company (SIRC) | [2] Enterprise | [3] argaam | [4] REVIVA | [5] Zawya | [6] Sharikat MUBASHER

Current Projects & Industry Opportunities

02.

Water projects:

Jubail 3A Independent Water Plant (IWP):
This is a SAR 2.44 billion desalination plant producing 600,000 m³ per day of potable water[1].

Shuqaiq 3 IWP (Reverse Osmosis):
A SAR 3 billion SWRO plant delivering 450,000 m³/day with 45% lower grid energy usage[3].

West Dammam ISTP:
A 200,000-350,000 m³/day sewage treatment plant serving Dammam with modular expansion capability[5].

Madinah 3 ISTP:
A new sewage treatment facility set to improve wastewater processing in Al-Madinah[7].

Ras Mohaisen IWP:
A SAR 2.6 billion project in the Al-Qunfudhah Governorate will provide 300,000 m³/day desalinated water to the region[8].

Rabigh 3 IWP (ACWA Power – SWPC):
Signed under a 25-year PPP framework, this is a 600,000 m³/day desalination plant[2].

Yanbu 4 IWP:
A SAR3.3bn project, this plant provides potable water using advanced reverse osmosis technology powered by solar energy[4].

Jeddah Airport 2 ISTP:
Sewage treatment plant at Jeddah airport handling high-volume waste flows[6].

Riyadh–Qassim IWTP:
A key BOOT (build, own, operate, and transfer) water transmission line, which, on completion, will have a transmission capacity of 685,000 cu m per day[8].

Ahsa & Eastern Province Strategic Reservoirs:
Two reservoirs with capacities of 1.39 Mm³ and 3.51 Mm³ under BOOT agreements[8].

Source: [1] NOMAC | [2] Acwa Power | [3] Almar Water Solutions | [4] Engie | [5] Saudi Water Partnership Company | [6] Veolia
[7] Saudi Water Partnership Company | [8] Smart Water Magazine

Current Projects & Industry Opportunities

02.

Opportunities in technology & workforce

With all these giga projects in motion, there is an immediate demand for innovation in environmental management, as well as the skilled workforce to bring these ambitions to realisation.

On the technology front, the priority areas include: smart water management systems such as IoT-integrated infrastructure; waste-to-energy tech to be able to reduce landfill use; circular economy infrastructure, so as to integrate recycling, reuse and sustainable materials right from the construction phase, and more.

From a workforce perspective, there is a need for specialised environmental engineers, waste management professionals, water treatment experts, as well as technology providers that have expertise in system design, AI integration and circular economy planning. From the educational front, there is also a demand for training partners and academies who can assist with training locally and implementing global knowledge within Saudi Arabia.

This, of course, opens the door for international partnerships and foreign direct investment in training and staffing.

It's very clear that Saudi Arabia's portfolio of giga and mega projects offer opportunities for environmental innovation, as well as sustainable development. The aim is to set new benchmarks in urban planning and sustainable measures, and for those in the water and waste management ecosystem looking to lead, this is a fertile ground to innovate.

03.

Why attend IFAT Saudi Arabia?

Why Attend IFAT Saudi Arabia

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IFAT Saudi Arabia arrives at a pivotal moment for the Kingdom – and for the world – and marks a milestone for the Middle East and North Africa region's circular economy and sustainability ambitions.

The launch of IFAT Saudi Arabia from 26 - 28 January 2026 at the Riyadh Front Exhibition & Conference Center brings a dedicated spotlight to everything from solid waste management and recycling to water supply and sewerage systems – all central to the success of Saudi Arabia's Vision 2030 and the national agenda.

For decades, IFAT has been recognised as the world's leading trade fair network for environmental technologies. With 11 trade fairs in 7 countries – apart from IFAT Saudi Arabia, IFAT is the perfect stage for solutions related to water, recycling and circularity. Its expansion into Saudi Arabia is both a response to regional developments and a signal of the Kingdom's growing global relevance in this space.

This inaugural edition is organized by dmg events and licensed by Messe München, while the event's Strategic Partner, the National Center for Waste Management (MWAN), adds tremendous weight to its purpose.

For the Kingdom of Saudi Arabia, the trade fair is an important part of Vision 2030. This offers great growth potential for environmental technologies and the circular economy. The ambitious goals include 91% source segregated waste, 79% of waste prepared for recycling and 90% diversion from landfills by 2040[1]. For the water sector, desalinating seawater, expanding water networks and building wastewater treatment plants and associated infrastructure to meet national needs are all being accomplished while diligently ensuring the sustainable extraction and consumption of this valuable resource, and protecting the natural environment of the Kingdom.

Source: [1] National Center for Waste Management (MWAN)

Why Attend IFAT Saudi Arabia

03.

Comprehensive sector coverage

The events will span critical environmental sectors including:

- Hydraulic engineering and well construction
- Water and sewage treatment
- Water supply and sewerage systems
- Mechanical engineering and plant engineering in water management
- Digitalisation and smart technologies in water
- Solid waste management and recycling
- Waste-to energy technologies
- Energy efficiency technologies, services and products
- Soil decontamination
- Air pollution control and noise reduction
- Environmental management services and R&D

Why you should attend

Whether you are a technology provider, government policymaker, investor, infrastructure developer or even an academic, you will benefit from attending the event.

IFAT Saudi Arabia offers:

- High-impact networking with industry leaders and decision-makers
- Product sourcing and showcases from global innovators
- Insightful panel discussions on the future of water and waste
- Discovery of potential investments and PPP opportunities
- A platform to directly support the objectives of Vision 2030 and beyond

As Saudi Arabia advances toward becoming a regional hub for circular economy innovation, this event offers an unmatched opportunity to engage with the ecosystem shaping that future. It is a place to begin partnerships, discover new technologies and align with the country's long-term environmental goals.

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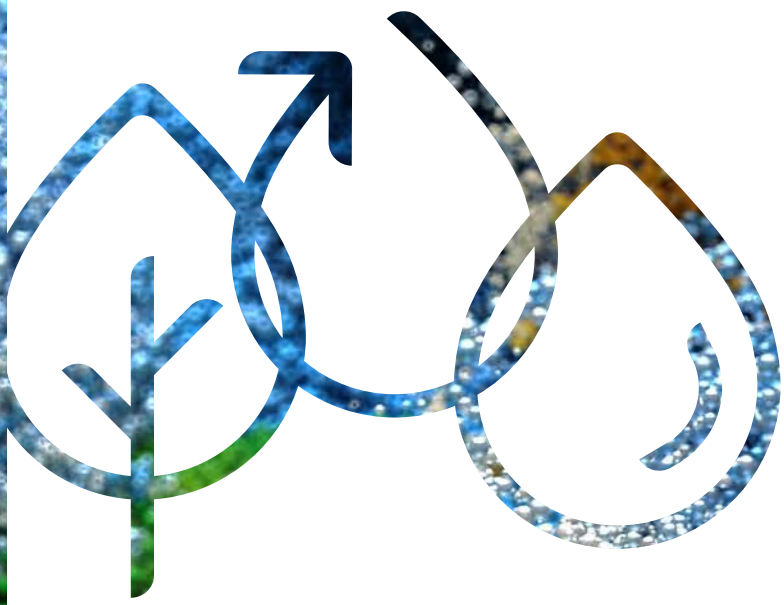

For exhibiting opportunities from the Middle East and Africa please contact:

Rama Homsi
Event Director
T: +971 50 582 2032
E: ramahomsi@dmgevents.com

Huda Alghamdi
Senior Sales Executive
T: +966 537999997
E: hudaalghamdi@dmgevents.com

For exhibiting opportunities from all other international markets please contact:

Eva Sauerborn
Exhibition Manager
T: +49 89 949-20251
E: eva.sauerborn@messe-muenchen.de

Marei Koch
Exhibition Manager
T: +49 89 949-20231
E: marei.koch@messe-muenchen.de

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