

GCC Labour Market Size, Share and Growth Analysis Report - Forecast Trends and Outlook 2025-2034

Market Report | 2025-07-15 | 112 pages | EMR Inc.

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Report description:

The GCC labour market size is expected to grow at a CAGR of 2.60% between 2025 and 2034. The market is being driven by increasing demand for labour to boost economic and industrial development, favourable labour laws in the region, and growing workforce.

Key Trends in the Market

Labour refers to a workforce which capable of performing various tasks requiring physical endurance, mental work, or administrative skills. In other words, it is an economic productivity of a person which can either be done by hand or brain. The skills and tasks of labour can vary, depending upon the nature of work.

- The GCC labour market is being driven by the rising demand for labour to stimulate the economic development of the region. Labour demand across the emerging economies such as Kuwait, Saudi Arabia, and Qatar, among others, is also witnessing a rise to bolster enterprise income, productivity, and jobs.
- The favourable labour laws for both domestic and foreign workers, such as tax relief, better access to health, paid leaves, prevention of discrimination, etc., are playing a pivotal role in the GCC labour market. Favourable labour laws are also encouraging workers from other countries to opt for work in the GCC region.
- The changing socio-economic and geopolitical scenario is leading to a greater emphasis on industrial automation and upgradation of services which is generating a high demand for skilled labour. Meanwhile, the increasing number of refugees in GCC countries from politically unstable countries, is expected to increase the supply of unskilled labours, which can be beneficial for short-term development programs.

- The rapid industrialisation and commercialisation are further bolstering the demand for labour across industries such as food service, oil and gas, manufacturing, healthcare, and hospitality, among others. The growing expansion of residential construction sector, owing to the rising disposable income, rapid urbanisation, and increasing foreign immigration, is also anticipated to provide impetus to the GCC labour market in the forecast period.

Market Segmentation

The EMR's report titled "GCC Labour Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by Employment

- Unskilled
- Clerical
- Management
- Skilled
- Professional

Market Breakup by End Use

- Oil and Gas
- Infrastructure
- Manufacturing
- Healthcare
- Hospitality
- Retail
- Logistics
- Telecom
- Agriculture
- Others

Market Breakup by Country of Origin

- India
- Pakistan
- Bangladesh
- Sri Lanka
- South East Asia
- European Union
- Others

Market Breakup by Region

- Saudi Arabia
- United Arab Emirates
- Kuwait
- Qatar

- Oman
- Bahrain

Market Share by Employment

The skilled segment, based on employment, is expected to witness a healthy growth in the forecast period. This can be attributed to the increasing emphasis on upskilling and focussed labour training across countries such as Kuwait, Qatar, and Saudi Arabia, among others. In addition, the increasing automation and upgradation of the workplaces across the region are generating a significant requirement for skilled labour. Moreover, flexible working hours and wage boosts which are foreseen in the coming years are likely to attract a greater number of skilled labours. Meanwhile, the unskilled labour segment accounts for a considerable share in the GCC labour market, driven by the increasing employment of unskilled temporary contract labours to implement small scale industrial or commercial activities in this region.

Market Share by End Use

Based on end use, the oil and gas segment accounts for a significant share in the GCC labour market. This can be attributed to the fact that the oil and gas sector accounts for a healthy share of the economy in the region. Major energy and power companies are located in the GCC and increasing operational activities to fuel the import and export of oil and gas are generating a substantial demand for labour.

Other key end use sectors in the labour market in the GCC include logistics, healthcare, and retail. With multiple trade routes between Africa, Europe, and Asia, the GCC is expanding in logistics capabilities, positioning itself as a logistics hub. The increasing geriatric population and prevalence of genetic diseases, obesity, and diabetes are surging the demand for professionals in healthcare. Meanwhile, growing culture of consumerism is enhancing the demand for retail, with labour requirements at all levels.

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