

Saudi Arabia Infrastructure - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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Report description:

Saudi Arabia Infrastructure Market Analysis

The Saudi Arabia Infrastructure market stands at USD 63.84 billion in 2025 and is projected to reach USD 81.64 billion by 2030, at a CAGR of 5.04% during the forecast period (2025-2030). Strong fiscal support under Vision 2030, a USD 1 trillion multi-year capital-spending plan, is accelerating activity across energy, transportation, and social assets. A growing pipeline of public-private partnership (PPP) schemes is widening the capital base, while giga-projects such as NEOM and New Murabba are institutionalizing modular, off-site, and AI-enabled building methods. Utility upgrades dominate award values, yet large transport corridors-including a 450 km high-speed rail link and airport expansions-signal a pivot toward multimodal logistics. Contractors that combine advanced construction technology with certified green practices are winning work, especially as authorities tighten carbon-reduction mandates before Riyadh Expo 2030 and the FIFA World Cup 2034.

Saudi Arabia Infrastructure Market Trends and Insights

Escalating Public Infrastructure Investments Under Vision 2030 Accelerating Non-Oil Sector Expansion

Capital commitments are scaling rapidly, with municipal allocations rising from USD 17.3 billion in 2024 to USD 21.3 billion in 2025. The National Infrastructure Fund targets more than USD 53 billion in blended finance by 2025, attracting global contractors that can deliver complex, multi-use assets. A standardized project-management framework adopted by the Riyadh Infrastructure Projects Center has already trimmed average delivery times by 18%, improving cash-flow cycles and boosting private-sector

confidence. Job-creation spillovers are sizeable, with an estimated 1.6 million positions to materialize by 2030. These initiatives collectively lift the non-oil share of GDP toward the government's 65% ambition.

Large-Scale Renewable Energy Programs Driving Grid Expansion and Energy Storage Infrastructure in Remote Areas

Renewable capacity will nearly double to 12.7 GW by end-2025 and is set to hit 20 GW by 2027. The launch of a 2.5 GW battery-energy-storage system (BESS) program-USD 1.8 billion spread across five remote nodes-illustrates grid-resilience priorities. Each site adds 500 MW/2,000 MWh, necessitating new high-voltage transmission, substations and maintenance roads. Interim milestones of 8 GWh by 2025 and 22 GWh by 2026 position the Kingdom among the three largest energy-storage markets worldwide. Specialized EPC firms with remote-area logistics and grid-integration capabilities are therefore in high demand. Associated civil works also open tenders for roads, accommodation camps and service ports, deepening the Saudi Arabia infrastructure construction market footprint in sparsely populated regions.

Rising Input Costs Due to Cement and Steel Supply Bottlenecks Affecting Project Budgets

Construction costs are expected to inflate 3.4-7% in 2025 as global tariffs disrupt materials supply chains. Steel demand is growing 3.9% annually, yet rebar and wire-rod capacity remains constrained. Labor accounts for up to 40% of costs, amplifying budget stress where skilled trades are scarce. Developers are hedging with early procurement and exploring AI-enabled cost-management tools. Firms versed in modular designs and alternative composites gain a buffer against volatility, giving them a margin advantage in the Saudi Arabia infrastructure construction market.

Other drivers and restraints analyzed in the detailed report include:

Nationwide Push for Digital Infrastructure Advancing Fiber-Optic Networks and 5G Tower Deployment / NEOM and Giga-Project Pipeline Fueling Demand for Modular, Off-Site, and Advanced Construction Methods / Delays in Financial Close for Mid-Tier PPP Projects Outside Flagship Developments Slowing Execution /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Utilities commanded 69% of the Saudi Arabia infrastructure construction market share in 2024. Robust investment in grid reinforcement and water-desalination plants underpins this dominance, highlighted by the 2.5 GW BESS rollout that adds 500 MW per site and USD 1.8 billion in civil and electrical works. Desalination-linked renewables, district cooling and wastewater recycling projects collectively broaden spend in coastal provinces. Social infrastructure trails in value yet gains strategic weight as USD 69.3 billion flows into healthcare, including five new hospitals scheduled by 2025.

Transportation is the fastest-expanding slice of the Saudi Arabia infrastructure construction market, growing 5.77% annually through 2030. A USD 147 billion logistics strategy calls for 28,000 km of road enhancements, airport upgrades in secondary cities and exploration of hyper-loop corridors. The Haramain high-speed rail's 450 km alignment showcases delivery momentum, carrying 25 million passengers in Q1 2025. Extraction-related infrastructure, though smaller, gains impetus from USD 2.5 trillion in mineral reserves; expanded haul roads, slurry pipelines and off-grid power facilities attract specialized EPC consortia.

The Saudi Arabia Infrastructure Market Report is Segmented by Infrastructure Segment (Transportation Infrastructure, Utilities Infrastructure, Social Infrastructure and Extraction Infrastructure), by Construction Type (New Construction and Renovation), by Investment Source (Public and Private) and by Key City (Riyadh, Jeddah and More). The Report Offers Market Size and Forecasts in Value (USD) for all the Above Segments.

List of Companies Covered in this Report:

ACWA Power / Aramco / Bechtel Corporation / Nesma & Partners / CRCC / Larsen & Toubro / SNC-Lavalin / Samsung C&T / Al-Ayuni Investment & Contracting / Elm Co. / Zain KSA / STC (Saudi Telecom Company) / Huawei Tech Investment Saudi / Ma'aden / Satorp / SABIC / Red Sea Global / Diriyah Gate Development Authority / Royal Commission for Jubail & Yanbu / Tatweer Buildings Co. /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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7 Market Opportunities & Future Outlook

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