

KSA Manned Security - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 127 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

KSA Manned Security Market Analysis

The KSA manned security market is expected to grow from USD 1.05 billion in 2025 to USD 1.13 billion in 2026 and is forecast to reach USD 1.66 billion by 2031 at 7.92% CAGR over 2026-2031. This robust expansion results from sustained infrastructure spending under Vision 2030, mandatory Saudization, and rising demand for integrated security-technology solutions. Large-scale projects such as NEOM's USD 5 billion DataVolt data center, AWS's USD 5.3 billion Saudi cloud region, and widespread stadium upgrades are generating steady contract pipelines. Saudi wage protection rules align labor costs with national standards, which increases operating expenses yet raises service quality expectations. Meanwhile, accelerated AI surveillance rollouts challenge labor-intensive business models but create hybrid opportunities for firms that can embed analytics with trained guards. Moderate competitive intensity persists as multinationals and PIF-backed SAFE invest in technology, training, and strategic tie-ups to secure long-term agreements across critical infrastructure, logistics, and mega-events.

KSA Manned Security Market Trends and Insights

Expansion of Giga Projects Under Vision 2030

NEOM, Red Sea Global and Diriyah Company are commissioning multi-billion-dollar assets that require layered security across construction and operational phases. NEOM's 24/7 command center unites AI analytics with manned patrols, driving strong appetite for guards trained in system monitoring and crowd control. Expanding stadium capacities to 92,000 seats at King Fahd

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Stadium and 45,000 seats at Prince Faisal bin Fahd Stadium illustrates the magnitude of personnel deployment for venue protection. Seven's plan to build 21 entertainment destinations in 14 cities multiplies site-based security needs and locks in long-term contracts for certified providers. The scale and geographic spread of these projects embed durable growth prospects for the KSA manned security market.

Mandatory Saudization Targets for Security Guards

Effective February 2025, private security roles are reserved predominantly for Saudi nationals, requiring 75-87% nationalization across security companies. Average Saudi guard wages of SAR 2,383-5,394 per month raise operating costs but simultaneously elevate service professionalism. SAFE Academy offers one-month training culminating in credentials such as CPO, CSSM, CPP and PSP, helping firms meet compliance while sharpening skill depth. Providers able to finance structured training pipelines gain an edge in tendering for government and giga-project contracts that strictly audit Saudization ratios

Rapid Adoption of AI-Enabled Video Surveillance

During Hajj 2024, authorities deployed 8,000 cameras across over 500 sites, integrated with Baseer and Sawaher analytics to automate threat detection. As ministries replicate this model nationally, some routine guard posts are replaced by sensors, tempering volume-driven demand. Nevertheless, complex scenarios still mandate human intervention, sustaining a need for guards trained to interpret AI alerts. Operators that re-skill staff for hybrid roles mitigate displacement risk and preserve margins within the KSA manned security market.

Other drivers and restraints analyzed in the detailed report include:

Surge in Critical InfrastructureGrowth in High-Value Logistics and Cash ManagementRising Labor Costs Driven by Wage Protection

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

Segment Analysis

Commercial facilities generated 40.92% of 2025 revenue, underpinned by an explosion of malls, mixed-use towers, and hospitality projects that require concierge-style guarding, vehicle screening, and crowd management. Fast digital-payment adoption raises cyber-physical convergence demands, prompting property managers to seek integrated video-analytics and access-control packages. Government and institutional sites, although smaller in share, post the top 8.67% CAGR as ministries outsource non-core protection and new hospitals, universities, and museums open. Industrial complexes, especially in petrochemicals, drive constant demand for armed escort and hazardous-area patrols, whereas residential compounds represent fragmented volumes that attract smaller regional vendors leveraging neighborhood familiarity.

Vision 2030's pivot toward private capital funnels continuous business into the KSA manned security market. Retail precincts run year-round promotions that spike footfall, needing extra guards for bag checks and traffic marshaling. Conversely, public-sector contracts tie renewals to Saudization performance and ISO-certified quality audits, favoring certified suppliers. Industrial clients often stipulate emergency-response teams and fire-safety coordination in addition to traditional guarding, layering revenue streams for well-equipped operators

Static posts accounted for 50.62% of 2025 billings and remain the entry-level bedrock of the KSA manned security market. These guards cover reception desks, site perimeters, and construction gates; yet clients increasingly insist on competence with body-worn cameras, digital incident logs, and visitor-management kiosks. Specialized K9, executive protection, and tactical-response units grow 10.62% annually because high-risk assets need bomb-sniffing coverage, close-protection details, or

rapid-intervention squads. Event security booms during Formula 1, Riyadh Season, and major sports tournaments, pushing operators to maintain caches of trained part-timers and mobile equipment such as metal detectors and crowd-control barriers.

Mobile patrol and CIT segments deepen diversification. Patrol cars fitted with AI-dashcams allow one vehicle to secure multiple low-risk sites over a night shift, trimming cost for small business clients. In CIT, SAMA's rulebook on sealed cash cassettes and dual-control keys sets a high compliance bar. Providers embed telematics, bullet-resistant cabins, and biometric ignition locks, raising capital intensity yet enabling premium pricing that helps offset wage inflation.

The Saudi Arabia (KSA) Manned Security Market Report is Segmented by End-User (Commercial, Industrial, Government and Institutional, and Residential), Service Type (Static Guarding, Mobile Patrol, Event/Crowd-Control Security, and More), Guard Classification (Unarmed Guards, and Armed Guards), Contract Duration (Long-Term, and Short-term/Event-based), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Allied Universal G4S (UK/US) Arabian Protective Services Group (APSG Saudi Arabia) Securitas AB (Sweden) The Arab Security and Safety Services Company (AMNCO KSA) Al Majal Al Arabi Security Services Co. (KSA) ETH Security Solutions Company LLC (KSA) Sharaf Din Security Services Co. (KSA) First Security Group (KSA) Nesma Security (Nesma Holding KSA) Hemaya Security Services (KSA) Al Suwaidi Services and Security (KSA) Al Kobra Security Co. (KSA) Tamimi Group - Security Division (KSA) Saudi Bell Group - Security Services (KSA) Security Forces Company Ltd. (KSA) Al Fareeq Security Services (KSA) Trans Eastern Protection Services (KSA) Fahd Security Services (KSA) Middle East Specialized Security (MESS KSA) Al Mabani Security (KSA)

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Expansion of GIGA Projects Under Vision 2030

4.2.2 Mandatory Saudization Targets for Security Guards

4.2.3 Growth in High-Value Logistics and Cash Management

4.2.4 Surge in Critical Infrastructure (NEOM Ports, Data Centers)

4.2.5 Mainstreaming Public-Private Security Partnerships

4.2.6 Demand From Private Mega-Events (Formula 1, Riyadh Season)

4.3 Market Restraints

4.3.1 Rapid Adoption of AI-Enabled Video Surveillance

- 4.3.2 Rising Labor Costs Driven by Wage Protection System
- 4.3.3 Grey-Market Guard Providers Undercutting Pricing
- 4.3.4 High Turnover Due to Stricter Work-Hour Regulations
- 4.4 Industry Ecosystem Analysis
- 4.5 Regulatory Landscape
- 4.6 Technological Outlook
- 4.7 Porter's Five Forces Analysis
- 4.7.1 Threat of New Entrants
- 4.7.2 Bargaining Power of Buyers
- 4.7.3 Bargaining Power of Suppliers
- 4.7.4 Threat of Substitutes
- 4.7.5 Intensity of Competitive Rivalry
- 4.8 PESTLE Analysis
- 4.9 Market Entry Strategy of Vendors

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 5.1 By End-user
 - 5.1.1 Commercial
 - 5.1.2 Industrial
 - 5.1.3 Government and Institutional
 - 5.1.4 Residential
- 5.2 By Service Type
 - 5.2.1 Static Guarding
 - 5.2.2 Mobile Patrol
 - 5.2.3 Event / Crowd-Control Security
 - 5.2.4 Cash-in-Transit (CIT) and Valuables Logistics
 - 5.2.5 K9 and Specialised Protection
- 5.3 By Guard Classification
 - 5.3.1 Unarmed Guards
 - 5.3.2 Armed Guards
- 5.4 By Contract Duration
 - 5.4.1 Long-term (above 12 months)
 - 5.4.2 Short-term / Event-based
- 5.5 By Region
 - 5.5.1 Central Region
 - 5.5.2 Eastern Province
 - 5.5.3 Western Region
 - 5.5.4 Northern Region
 - 5.5.5 Southern Region

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)
 - 6.4.1 Allied Universal G4S (UK/US)

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

- 6.4.2 Arabian Protective Services Group (APSG Saudi Arabia)
- 6.4.3 Securitas AB (Sweden)
- 6.4.4 The Arab Security and Safety Services Company (AMNCO KSA)
- 6.4.5 Al Majal Al Arabi Security Services Co. (KSA)
- 6.4.6 ETH Security Solutions Company LLC (KSA)
- 6.4.7 Sharaf Din Security Services Co. (KSA)
- 6.4.8 First Security Group (KSA)
- 6.4.9 Nesma Security (Nesma Holding KSA)
- 6.4.10 Hemaya Security Services (KSA)
- 6.4.11 Al Suwaidi Services and Security (KSA)
- 6.4.12 Al Kobra Security Co. (KSA)
- 6.4.13 Tamimi Group - Security Division (KSA)
- 6.4.14 Saudi Bell Group - Security Services (KSA)
- 6.4.15 Security Forces Company Ltd. (KSA)
- 6.4.16 Al Fareeq Security Services (KSA)
- 6.4.17 Trans Eastern Protection Services (KSA)
- 6.4.18 Fahd Security Services (KSA)
- 6.4.19 Middle East Specialized Security (MESS KSA)
- 6.4.20 Al Mabani Security (KSA)

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

7.1 White-space and Unmet-Need Assessment

KSA Manned Security - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 127 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-07"/>

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com