

Saudi Arabia Waste Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

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Report description:

Saudi Arabia Waste Management Market Analysis

The Saudi Arabia Waste Management Market is expected to grow from USD 25.84 billion in 2025 to USD 27.84 billion in 2026 and is forecast to reach USD 40.42 billion by 2031 at 7.74% CAGR over 2026-2031. Vision 2030's circular-economy mandate, rising urbanization, and the National Center for Waste Management's 94% landfill-diversion target are propelling capital into advanced treatment technologies. Construction mega-projects, mandatory source segregation beginning in 2025, and carbon-credit eligibility for waste-to-energy facilities after 2027 are widening the revenue base across collection, recycling, and recovery services. Private-sector public-private partnerships (PPPs) totaling more than 200 projects are accelerating infrastructure rollout, while international operators leverage joint ventures to localize technology and meet Saudi standards. Competitive differentiation is quickly shifting from landfilling capacity to integrated resource-recovery models that unlock value from municipal solid, construction, and e-waste streams.

Saudi Arabia Waste Management Market Trends and Insights

Vision 2030 Zero-Landfill Targets Reshape Investment Priorities

The Kingdom's pledge to divert 94% of waste from landfills by 2035 is triggering a wholesale shift from disposal toward recycling, composting, and waste-to-energy. Over 840 new facilities are planned within 25 regional clusters, reducing logistics costs and ensuring balanced geographic coverage. Operators that establish integrated hubs early in Riyadh and Jeddah secure first-mover

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advantages before compliance deadlines tighten. Clear liability assignment under the Waste Management Law and eligibility of waste-to-energy carbon credits after 2027 de-risk capital commitments. Consequently, the Saudi Arabian waste management market is aligning investment flows with long-term regulatory certainty.

Private-Sector PPP Pipeline Accelerates Infrastructure Development

A PPP pipeline exceeding USD 700 million is unlocking private capital for collection fleets, sorting lines, and waste-to-energy plants. The National Center for Privatization standardizes tender documents, trimming transaction costs and shortening bid cycles. Flagship deals such as SIRC-Veolia joint ventures demonstrate how international technology is localized through Saudi majority ownership structures. In water services, similar PPP frameworks have already slashed delivery timelines by 25%, offering a playbook for waste infrastructure. Competitive concession awards and 20-year offtake agreements further strengthen bankability across the Saudi Arabian waste management market.

High Upfront CapEx Requirements Constrain Market Entry

Waste-to-energy lines often exceed USD 150 million in capital cost, limiting participation to well-capitalized conglomerates or foreign utilities. Financing cycles of three to five years prolong payback horizons, deterring smaller tech innovators. In secondary cities, lower waste volumes erode economies of scale, making it hard to service debt covenants. Although PPP structures offer viability-gap funding, local banks' limited track record with waste assets inflates risk premiums. As a result, market consolidation around SIRC, Veolia, and SUEZ is likely to intensify within the Saudi Arabian waste management market.

Other drivers and restraints analyzed in the detailed report include:

Economic Growth & Urban Migration Drive Infrastructure Demand
Mandatory Source Segregation Creates Operational Transformation
Fragmented Collection Systems Limit Operational Efficiency

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

Segment Analysis

Residential streams supplied 54.02% of Saudi Arabia's waste management market share in 2025, underscoring the enduring influence of household behavior on collection routes and service design. Urban households generate an average of 1.4 kg per capita daily, creating predictable tonnage that underpins baseline revenues for fleet operators. Yet commercial generators-shopping malls, office complexes, and logistics hubs are raising output by 9.49% CAGR, adding premium opportunities for source-segregated pickups and after-hours service windows. The Saudi Arabia waste management market size for commercial waste is projected to add more than USD 2.9 billion by 2031 as mixed-use property pipelines in Riyadh Front and Jeddah Corniche reach completion.

Industrial sources remain significant in absolute tonnage, particularly in the Eastern Province, where petrochemical complexes supply hazardous streams that demand specialized permits and command fees two to three times higher than municipal waste. Healthcare and pharmaceutical facilities contribute a smaller but high-margin biomedical niche requiring licensed incineration operators. Construction and demolition (C&D) debris from mega-projects like NEOM and Red Sea Destination creates seasonal surges, encouraging players to deploy mobile crushing units that convert concrete into certified aggregates. Integrated service providers that bridge residential reliability with commercial customization are poised to capture outsized wallet share in the Saudi Arabia waste management market.

The Saudi Arabia Waste Management Report is Segmented by Source (Residential, Commercial, Industrial, and More), by Service

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Type (Collection, Transportation, Sorting & Segregation, and More), by Waste Type (Municipal Solid, Industrial Hazardous Waste, E-Waste, and More), and by Region (Riyadh, Makkah Province, Eastern Province, and the Rest of Saudi Arabia). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Saudi Investment Recycling Co. (SIRC) BEEAH Group Veolia Middle East Averda SUEZ Middle East Ramky Enviro Engineers Al-Fahhad Zegwaard NESMA Recycling Waste Collection & Recycling Co. Sama Environmental Services Greenland for Environmental Solutions Dulsco Saudi Envac Gulf Global Environmental Management Services (GEMS) Al Naboodah Environment Bee'ah Saudi JV

Additional Benefits:

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

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5 Market Size & Growth Forecasts (Values, In USD Billion)

5.1 By Source

5.1.1 Residential

5.1.2 Commercial (retail, office, etc.)

5.1.3 Industrial

5.1.4 Medical (Health and Pharmaceutical)

5.1.5 Construction & Demolition

5.1.6 Others (institutional, agricultural, etc)

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5.2.1 Collection, Transportation, Sorting & Segregation

5.2.2 Disposal / Treatment

5.2.2.1 Landfill

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5.4.2 Makkah Province (incl. Jeddah)

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7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-need Assessment

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