2FAST
MARKET DEVELOPMENT

ECONOMIC AND MARKET OUTLOOK

Saudi Arabia Economic and Market Outlook

Economic transformation, market strengths and investment pathways

2FAST – MARKET DEVELOPMENT

Data cutoff 1 November 2026

EXECUTIVE SUMMARY

A broadening economic base

Saudi Arabia combines a large domestic market with established energy and industrial capabilities, expanding services and a substantial investment programme. The most useful market reading separates realised activity from investment plans, and national production from trade intermediation. [1][8][12]

Economic scale	Market depth	Investment activity
SAR 4.78tn	35.3m residents	SAR 81.4bn
Nominal GDP · 2025	Population estimate · 2024	Net inward FDI · 2025

Sources [1], [5], [12]

Five findings for decision makers

A diversified activity base is visible in national accounts. Non-oil activities generated 58.9% of current-price GDP in 2025. Manufacturing excluding refining, trade and hospitality, construction, and financial and business services all represent substantial domestic activity. This activity classification differs from the institutional private sector. [1]

Demand has several distinct sources. Household consumption, industrial investment and visitor expenditure support different product and service requirements. The household survey also shows why segmenting consumers by household characteristics is more useful than relying on GDP per capita. [1][6][34]

International participation already operates at scale. Goods imports were SAR 949.8 billion in 2025 and services imports SAR 488.6 billion. These totals describe expenditure across many products and contracts; a viable entry case still requires customer, specification and competitive analysis. [8][11]

The latest activity picture is mixed. Q3 2026 flash real GDP fell 3.8% year on year as oil activity contracted, while non-oil activity grew 1.9%. The IMF's October forecast anticipates a 2027 rebound; this is a conditional forecast rather than an operating result. [2][50]

Entry pathways are becoming more structured. Investment registration, sector permissions, product conformity, employment planning and local-content rules define the practical route from market interest to operations. Incentive eligibility depends on the specific project. [39][40][45][46][47]

> 2FAST interpretation: prioritise an identifiable customer requirement and a delivery capability. Select the business model, location and capital commitment around that requirement, then verify the regulatory and procurement route.

ECONOMIC DASHBOARD

Scale and momentum

Data cutoff: 1 November 2026. Annual results, quarterly observations and forecasts appear separately. Values are rounded for readability; underlying values and calculations are available in the accompanying workbook.

Indicator	Value	Period and basis	Ref.
Nominal GDP	SAR 4,775.8bn	2025 · current prices	[1]
Real GDP growth	4.6%	2025 · annual volume growth	[1]
Non-oil share of GDP	58.9%	2025 · current-price activities	[1]
Private-sector share	54.0%	2025 · institutional definition	[1]
Gross fixed capital formation	SAR 1,354.5bn	2025 · expenditure measure	[1]
Population	35.3m	Mid-2024 · all nationalities	[5]
Median household income	SAR 7,362/month	2023 · disposable household income	[6]
Saudi unemployment	6.5%	Q2 2026 · labour force aged 15+	[7]
Goods exports / imports	1,170.0 / 949.8bn	2025 · SAR, customs basis	[8]
Services exports / imports	251.7 / 488.6bn	2025 · SAR, BPM6 basis	[11]
Net inward FDI / stock	81.4 / 1,058.8bn	2025 flow / end-year stock · SAR	[12]
Real GDP / non-oil growth	−3.8% / +1.9%	Q3 2026 · year-on-year flash	[2]
Real GDP forecast	−3.3% / +7.9%	2026 / 2027 · IMF October vintage	[50]

Reading the dashboard: GDP measures domestic value added; imports measure cross-border purchases; investment stocks measure outstanding positions. These quantities cannot be added to form a single market-size estimate. The population and household-survey periods are older than the activity indicators and remain explicitly dated.

Reading routes

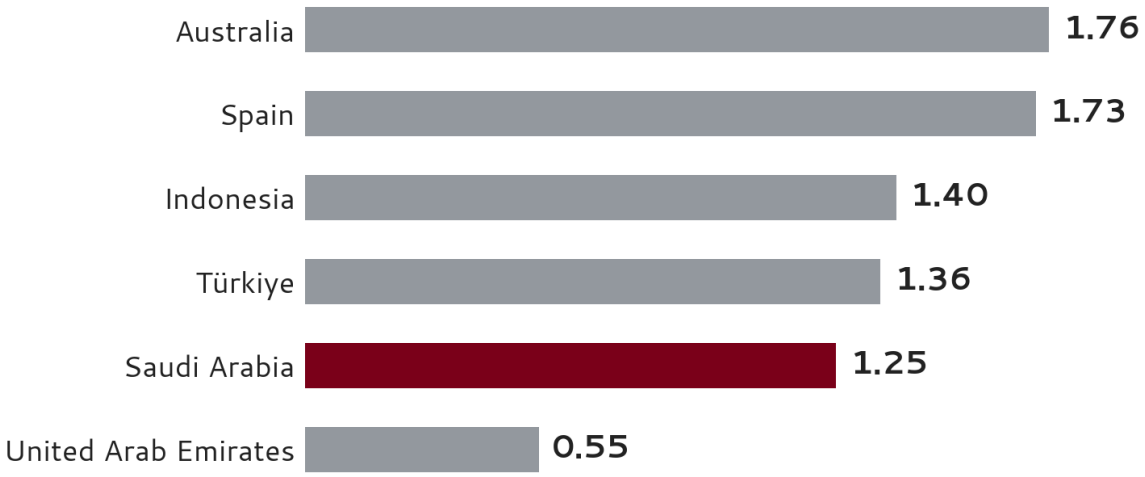
Understand the market	Locate demand	Prepare participation
4–8 · Scale, transformation, households and labour	9–14 · Trade, investment and economic geography	24–26 · Registration, operating requirements and support
15–22 · Eight sector perspectives	23 and 27 · Regional clusters and project stages	28–30 · Entry pathways, outlook and methodology

MARKET POSITION

Economic scale in context

A common-year comparison places Saudi Arabia alongside sizeable international economies while retaining a distinct regional production and consumption profile. The comparison below measures nominal output at market exchange rates, not purchasing power or investment attractiveness. [3]

Selected economies by nominal GDP



2024 · USD trillion · World Bank current-dollar series. Selected benchmarks, not an exhaustive ranking. [3]

Saudi GDP was approximately USD 1.25 trillion in the common 2024 dataset. Spain and Australia provide useful advanced-economy scale comparisons; Türkiye and Indonesia provide large-market comparisons; the UAE adds a nearby Gulf benchmark. Differences in population, economic structure and exchange rates remain material. [3]

For domestic operating analysis, this report uses Saudi riyals and the latest GASTAT detailed national accounts. The 2025 nominal GDP estimate of SAR 4.78 trillion corresponds to approximately USD 1.27 trillion at SAR 3.75 per US dollar. That conversion is an aid to scale comparison, not a second measure of output. [1][52]

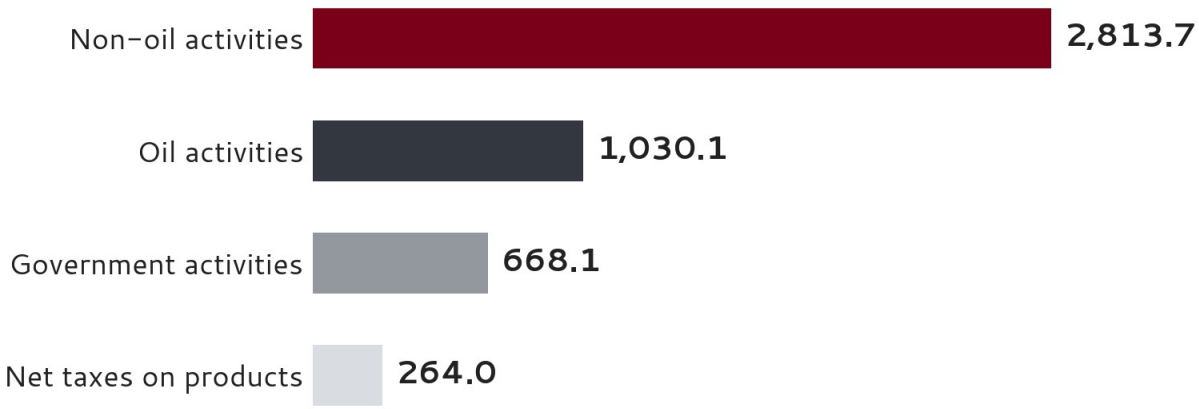
> 2FAST interpretation: market scale supports a wide customer universe, but entry planning should use an industry and customer denominator. A national GDP comparison does not establish a product's addressable market.

GROWTH AND STRUCTURE

Non-oil activity anchors the market

Real GDP expanded 4.6% in 2025 on the latest detailed annual calculation. The nominal activity mix shows the breadth of the economy, while the 2026 flash estimates distinguish continuing non-oil growth from the oil-cycle effect on the headline result. [1][2]

Composition of current-price GDP



2025 · SAR billion · Non-overlapping activity components and net taxes; rounding may affect totals. [1]

Latest real activity	Q3 2026 y/y	Quarterly SA
Total GDP	-3.8%	+1.3%
Non-oil activities	+1.9%	+0.6%
Oil activities	-20.4%	+5.7%
Government activities	-2.7%	-1.2%

Sources [2]

Oil activity includes crude petroleum, natural gas and refining. Non-oil activities exclude both this category and government non-market activities. The institutional private-sector series is a different classification: its 2025 current-price value was SAR 2,576.9 billion, or 54.0% of GDP. It must not be added to the non-oil activity total. [1]

> 2FAST interpretation: use non-oil sector demand and contract evidence to assess operating prospects. Headline oil-driven movements remain relevant for funding, trade and timing, but do not describe every customer segment.

VISION 2030

Transformation with measurable outcomes

Published programme indicators show gains in housing access, women's participation and health-service coverage. Baselines, achieved values and future targets are shown as separate observations; an achieved improvement does not mean every interim target has been met. [4] [51]

Programme indicator	Baseline[1]	2025 result	2030 target
Saudi family homeownership	47%	66.24%	70%
Saudi female participation	22.8%	35.0%	40.0%
Population centres covered by healthcare	84.13%	97.5%	99.5%

Sources [4], [51]

[1] Vision baselines are programme-specific, generally around launch; they are not presented as one harmonised census year. Homeownership rose by 19.24 percentage points. The participation indicator in the annual Vision report differs in reference period from the latest quarterly labour survey. [4][51]

How these outcomes connect to the economy

Housing programmes link mortgage access and residential supply with demand for construction products, equipment, household goods and services. The homeownership indicator describes Saudi families and should not be interpreted as the ownership rate of all resident households. [4]

Female participation reached 35.0% in the Vision annual indicator, below its 36.6% interim target but above the published baseline. The report also records vocational graduate employment outcomes below the annual benchmark, indicating the continuing importance of matching training with employer needs. [4]

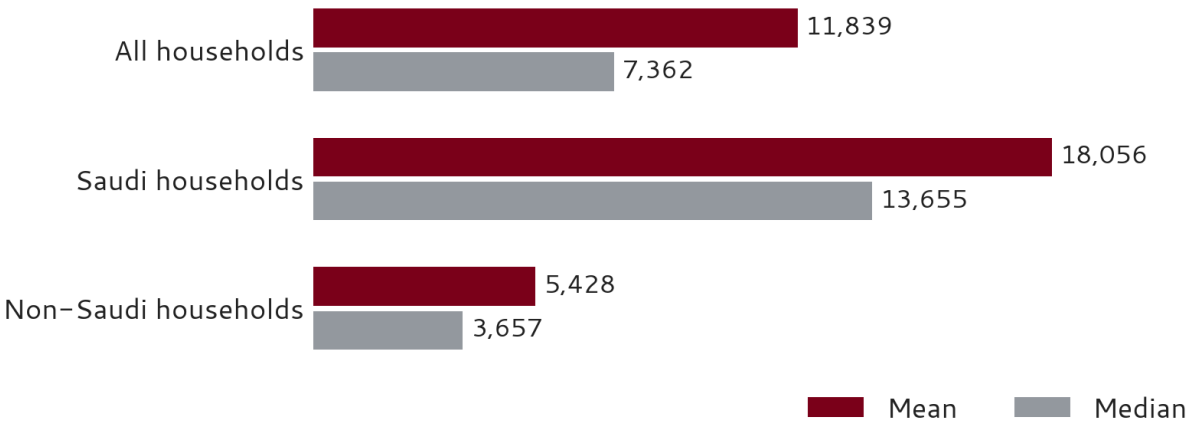
Healthcare coverage of population centres reached 97.5%. This is a geographic service-access indicator, rather than a measure of insured individuals, hospital beds or the private healthcare market. It provides a different view of service expansion from spending or facility counts. [4][51]

> 2FAST interpretation: connect programme outcomes to the relevant buyer and service requirement. Supplier readiness, operating capability and workforce development determine how a company participates in the resulting activity.

A diverse household market

The validated mid-2024 population estimate is 35.3 million. Saudi citizens account for 55.6% of the population; resident nationality and age structures differ, reinforcing the value of segmented demand analysis. [5]

Mean and median household disposable income



2023 · SAR per household per month · Household averages are not individual salaries. [6]

The 2023 survey reports mean monthly disposable household income of SAR 11,839 and a median of SAR 7,362. Saudi households and non-Saudi households differ in both income and composition. The median and mean therefore answer different questions about household purchasing power. [6]

Average household consumption expenditure was SAR 10,884 per month, including imputed consumption such as owner-occupied housing. Final monetary consumption averaged SAR 9,426. Food and beverages represented 27.9% of monetary spending and housing and utilities 14.1%. These are survey-period weights, not current retail growth rates. [6]

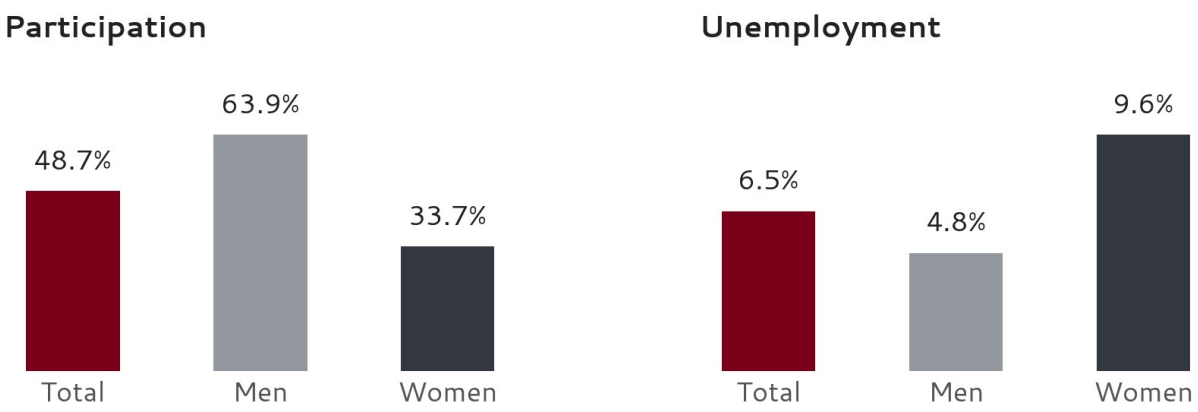
Working-age residents aged 15–64 represented 62.7% of Saudis and 89.9% of non-Saudis, within each nationality group. National consumer-price inflation was 1.9% year on year in September 2026. Household-specific costs still depend on the spending basket; the 2023 income survey is not a current-income estimate. [5][64]

> 2FAST interpretation: specify price tier, household type, channel and geography before projecting sales. The dated survey is a structural reference; validate current prices, housing costs and customer behaviour for a commercial launch.

Workforce participation and capability

Q2 2026 survey estimates show a 3.0% unemployment rate across all nationalities and 6.5% among Saudis. Participation, employment and unemployment describe different denominators and should be read together. [7]

Saudi labour market indicators



Q2 2026 · percent · Age 15+. Participation uses working-age population; unemployment uses the labour force. [7]

Saudi labour-force participation was 48.7%, comprising 63.9% for men and 33.7% for women. Saudi employment as a share of the working-age population was 45.5%. The unemployment rate increased slightly from 6.4% in Q1, while remaining below 6.8% a year earlier. [7]

Planning employment around the operating model

Employment preparation includes activity and occupation classification, recruitment, documented contracts and the applicable localisation requirements. HRSD's 2026 guidance links electronically documented contracts on Qiwa to employment counting in Nitaqat. Requirements depend on the entity and activity; a single national quota would misrepresent the system. [44]

The Vision report identifies alignment between qualifications and jobs as an ongoing delivery priority. Technical training, supervised work experience and role-specific assessment are therefore relevant elements of supplier development and industrial ramp-up. [4]

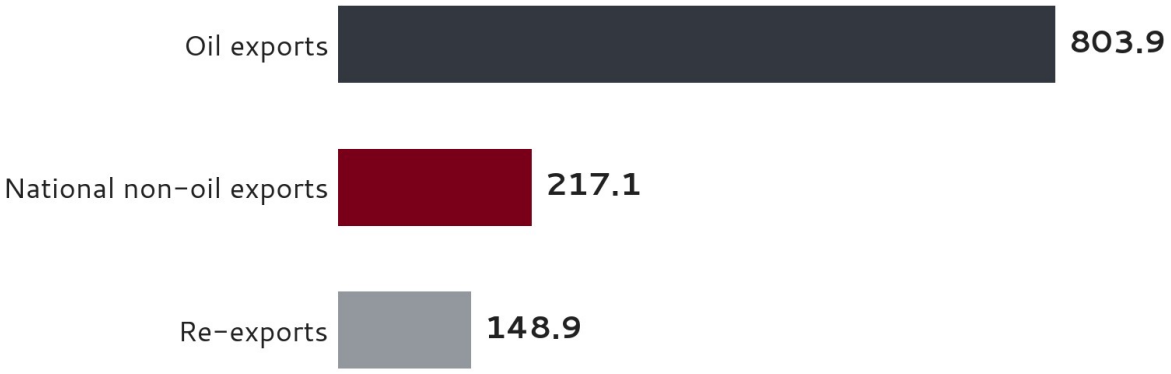
> 2FAST interpretation: build the staffing plan with the production or service process. Identify technical roles, training time, supervisory capacity and localisation obligations before fixing the operating budget.

GOODS TRADE

Production and trade intermediation

Saudi goods exports totalled SAR 1,170.0 billion in 2025, against imports of SAR 949.8 billion. The resulting customs trade surplus was SAR 220.1 billion. The export mix separates domestic production from re-export activity. [8]

Three components of goods exports



2025 · SAR billion · National non-oil exports exclude re-exports. Customs basis. [8]

National non-oil exports were SAR 217.1 billion and re-exports SAR 148.9 billion, together producing SAR 366.1 billion in non-oil exports including re-exports. Re-exports contributed 40.7% of that combined figure. Oil goods exports were SAR 803.9 billion. [8]

The annual release reports 18.9% growth in non-oil exports including re-exports, with re-exports rising 64.4% while national non-oil exports were broadly flat at -0.1%. These differences show why the combined measure should not be used alone to describe Saudi manufacturing output. [8]

A distinct role for trade services

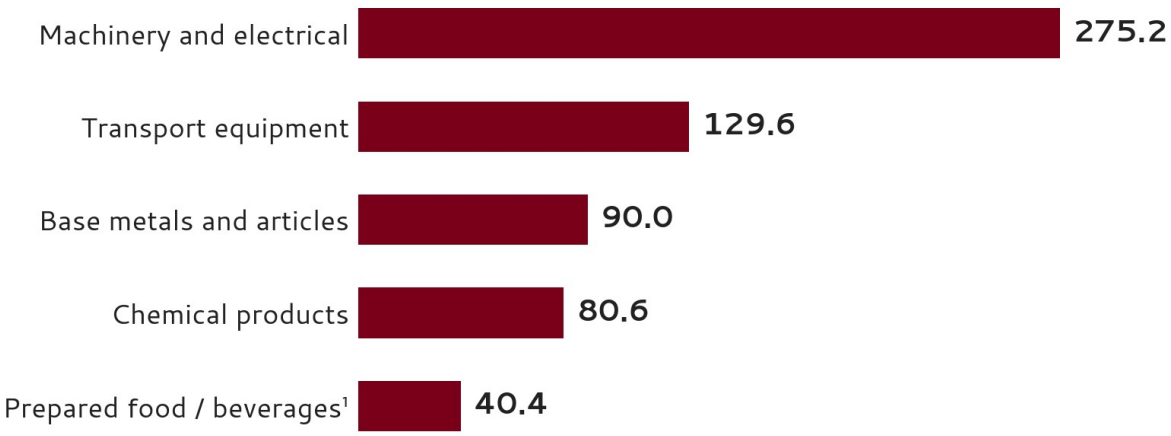
Re-export growth records goods entering and leaving the customs trade system. It is relevant to distribution, inventory handling and logistics, but its gross value is not domestic value added. The same distinction applies when assessing a regional distribution operation. [8]

> 2FAST interpretation: manufacturers should track national export products and buyer specifications; distributors should assess re-export routes, customer coverage, inventory economics and customs procedures separately.

The composition of import demand

Machinery and electrical equipment accounted for SAR 275.2 billion of goods imports in 2025. Transport equipment, metals and chemicals form additional large categories, each encompassing products with different buyers and qualification requirements. [8]

Selected import categories



2025 · SAR billion · HS sections. Transport equipment includes vehicles, aircraft and vessels. [1] Includes tobacco. [8]

Trading relationship	Share in 2025	Coverage
China / United States / UAE	27.5% / 8.2% / 5.7%	Goods import origins
China / UAE / India	14.6% / 10.0% / 9.4%	Goods export destinations

Sources [8]

The latest complete monthly release is August 2026: exports were SAR 87.2 billion and imports SAR 71.6 billion, down 11.5% and 9.1% year on year respectively. National non-oil exports grew 8.5%, while re-exports fell 34.0%. September's advance release records SAR 27.8 billion in combined non-oil exports and SAR 69.1 billion of imports; full oil-export data are not included. [9][10]

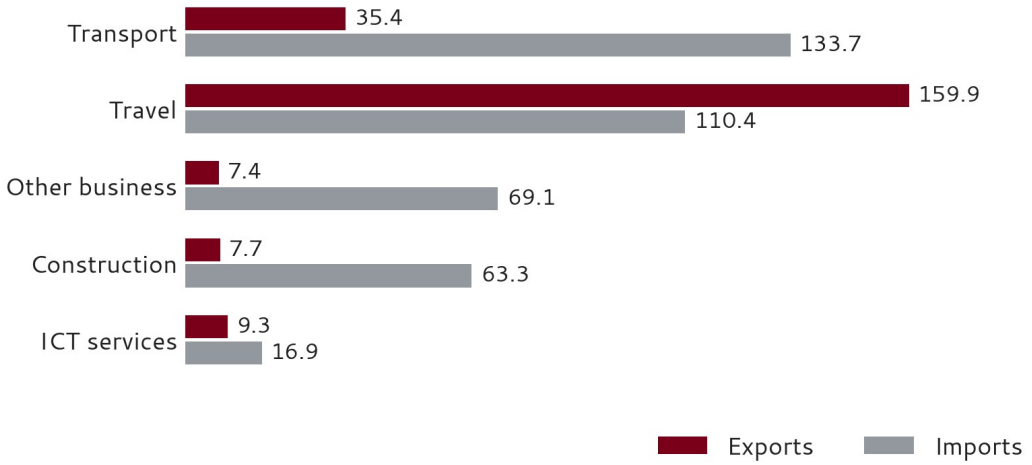
2FAST interpretation: use the HS code, end user, installed base and delivery specification to refine the commercial case. Aggregate imports alone do not establish local substitution feasibility or supplier margins.

SERVICES TRADE

A market for specialised capabilities

Services exports reached SAR 251.7 billion in 2025 and imports SAR 488.6 billion. Cross-border purchases span transport, travel, business services and construction; their composition points to different kinds of international participation. [11]

Selected service trade categories



2025 · SAR billion · BPM6 / EBOPS 2010; rounded values. [11]

Travel generated SAR 159.9 billion in exports and transport SAR 35.4 billion. On the import side, transport reached SAR 133.7 billion, travel SAR 110.4 billion, other business services SAR 69.1 billion and construction SAR 63.3 billion. Other business services include professional and management consulting within a wider category. [11]

The services balance was −SAR 236.9 billion; travel recorded a SAR 49.5 billion surplus using rounded inputs. These balance-of-payments measures differ from tourism-survey spending. [11]

From cross-border provision to a local service platform

Investment registration and the relevant professional or sector permissions determine whether a service can be supplied through a local entity. Productive participation can involve project-specific technical services, recurring operations or a licensed local practice, depending on the activity. [39] [40]

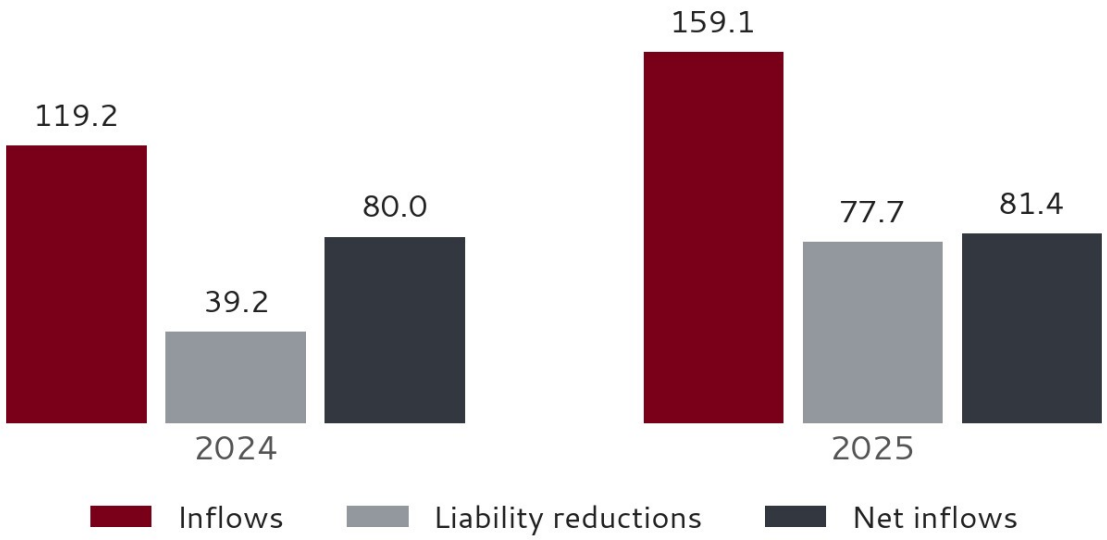
> 2FAST interpretation: establish where the service is delivered, who contracts and pays for it, and which professional permissions apply. Contract duration, knowledge transfer and continuing support shape the appropriate presence.

INVESTMENT

Capital formation and foreign investment

Domestic fixed investment and inward FDI measure different aspects of capital activity. Gross fixed capital formation was SAR 1,354.5 billion in 2025, equivalent to 28.4% of nominal GDP. FDI additionally captures financial relationships and ownership positions. [1] [12]

Annual inward FDI flows



2024 and 2025 · SAR billion · Latest annual vintage. Reductions are decreases in inward investment liabilities. [12]

In 2025, inward FDI inflows were SAR 159.1 billion and reductions in inward liabilities SAR 77.7 billion, leaving net inflows of SAR 81.4 billion. The inward stock reached SAR 1,058.8 billion at year end. Stock changes also reflect valuation and other adjustments, so they need not equal net annual flows. [12]

Manufacturing held SAR 285.4 billion of the inward stock, followed by trade at SAR 157.7 billion and finance at SAR 133.1 billion. These are investment positions by activity, rather than factory expenditure or annual sales. [12]

The Q2 2026 release reports net inward FDI of SAR 19.1 billion, from SAR 22.3 billion of inflows and SAR 3.2 billion of reductions. This quarterly observation is shown separately from the subsequently revised 2025 annual series. [13]

> 2FAST interpretation: distinguish acquisition finance, equity capital, intercompany funding and physical asset expenditure when assessing a proposed investment. Licences and announced projects are additional records, not substitutes for realised flows.

CAPITAL AND FINANCIAL SERVICES

Institutions supporting market activity

Public investment institutions, commercial finance and payments infrastructure support different parts of the economy. Their reported stocks, deployment measures and transaction indicators should retain their original accounting boundaries. [14][15][16]

Measure	Published observation	Interpretation
PIF assets under management	Approximately SAR 3.4tn · end-2025	Global asset stock
PIF domestic deployment	More than SAR 750bn · 2021–25	Cumulative domestic investment
2027 planned revenue / spending	SAR 1,202bn / 1,392bn	Pre-budget plan
Electronic retail payments	85% · 2025, from 79% in 2024	SAMA retail-payment share

Sources [14], [15], [16]

PIF's portfolio and development role connect to industrial, service and infrastructure activity. AUM includes assets beyond Saudi Arabia and cannot be treated as domestic expenditure. Cumulative deployment must likewise be kept separate from annual investment and from the capital expenditure of portfolio companies. [14]

The FY2027 pre-budget statement envisages a SAR 190 billion gap between spending and revenue, equivalent to the ministry's stated 3.6% of GDP. These planning figures describe a fiscal envelope; sector procurement still depends on project-specific allocations and awards. [15]

Electronic payment adoption

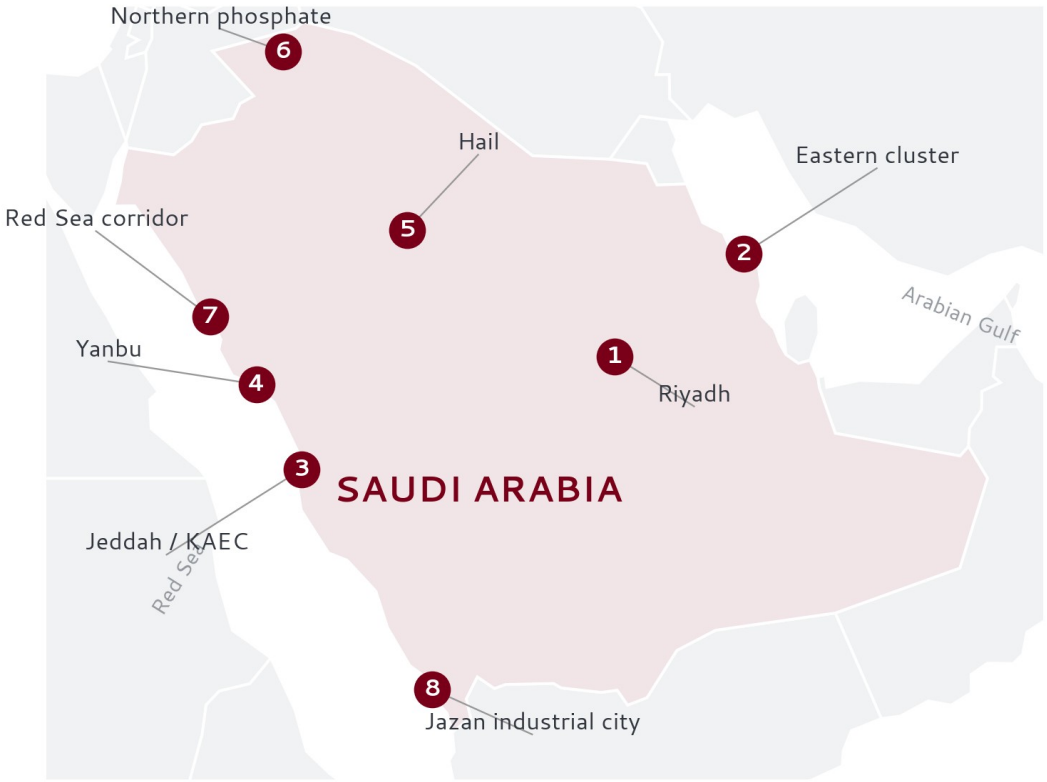
2024–25 · percent of retail payments · SAMA measure. Increase: 6 percentage points. [16]

> 2FAST interpretation: financial and professional-service propositions benefit from defined client workflows—payments, treasury, project controls or compliance. A financing institution's portfolio is a route to investigate buyers, not an order book available to every supplier.

A network of specialised centres

Selected economic centres connect established industrial capacity, large consumer markets, gateway infrastructure and destination development. The map is illustrative and does not assign regional GDP shares. [18][19][26][28][35][37][38]

Selected centres and production clusters



Approximate location markers; simplified country outline. Numbers correspond to the regional guide on page 23. No administrative-region boundaries are implied. [18][19][28][35][37][38][53]

The Eastern Region links energy and process industries with Jubail, Dammam and Ras Al-Khair. The western corridor connects Jeddah, the Makkah market, King Abdullah Economic City and Yanbu. Riyadh brings together metropolitan demand, corporate services and the operating metro network. [18][19][26][28]

Hail and the northern mining ecosystem, Jazan's industrial city and the Red Sea destination corridor add differentiated locations beyond the three largest metropolitan markets. Facility location, administrative region and city population are separate geographic concepts. [19][21][35][37][38]

> 2FAST interpretation: select a site against customer proximity, utilities, labour availability, logistics and the specific industrial authority's terms. Geographic specialisation provides an initial screen, followed by a site-level assessment.

SECTOR 1 INDUSTRIAL CAPABILITIES

Manufacturing and process industries

Manufacturing excluding petroleum refining generated SAR 533.0 billion in current-price value added in 2025. An established petrochemical base and continuing factory openings support demand across production inputs, equipment and operating services. [1][17][20]

Industrial indicator	2025 observation	What it measures
New industrial licences	1,660	Authorisations issued
Associated investment in licences	SAR 76bn	Reported project investment
Factories starting production	1,201	Operational starts during year
Investment associated with starts	SAR 31bn	Associated factory investment
SABIC production	55.5m metric tonnes	Global group output

Sources [17], [20]

Jubail and Yanbu are established RCJY industrial cities. Their role links process production with utilities, logistics and specialised industrial services. SABIC's group production illustrates corporate scale, while its international footprint means the group total is not a measure of Saudi output. [18][20]

Demand and participation

The customs data identify SAR 80.6 billion of chemical-product imports and SAR 29.8 billion of plastics and rubber imports in 2025. These categories include differentiated formulations and applications; a domestic feedstock advantage does not establish competitiveness in every finished product. [8]

Participation route	Buyer requirement to validate
Process equipment and maintenance	Approved specifications, shutdown timing and continuing service
Specialty inputs and conversion	Application testing, consistency and customer qualification
Local manufacturing or partnership	Demand commitments, utilities and industrial/site permissions

Sources [39], [40], [45]

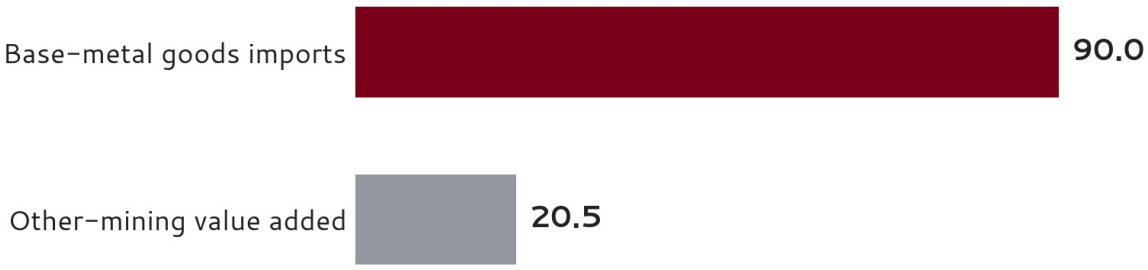
> 2FAST interpretation: frame the proposition around plant reliability, product performance or a specific downstream application. Use licence announcements as leads, then confirm production status and the purchasing entity.

SECTOR 2 MINING AND METALS

An integrated minerals value chain

Ras Al-Khair's phosphate and aluminium industries connect mineral resources with processing and logistics infrastructure. The mining ecosystem also extends to the northern phosphate cluster and the supporting equipment and service base. [19][21]

Relevant domestic activity and trade



2025 · SAR billion · Other-mining value added and base-metal imports are different measures and are not additive. [1][8]

Other mining and quarrying generated SAR 20.5 billion in current-price value added in 2025. Imports of base metals and their articles reached SAR 90.0 billion. The latter include numerous grades and finished articles; they do not measure an unserved domestic market. [1][8]

The ministry reported 2,925 active mining licences at the end of 2025 across licence categories. This count describes the regulatory portfolio, not the number of producing mines. Maaden's annual disclosures provide project-level context for the phosphate and metals chain. [17][21]

Participation along the operating chain

Application	Commercial and technical preparation
Exploration and mineral services	Relevant licence scope, technical qualifications and work programme
Processing and asset services	Process compatibility, uptime requirement and site qualification
Metal transformation	Grade, tolerances, customer approvals and material traceability

Sources [17], [19], [39], [40]

2FAST interpretation: evaluate the specific ore, processing step or metal application. Resource potential, a licence, a financed project and an operating plant each represent a different stage of possible supplier demand.

SECTOR 3 ADVANCED MANUFACTURING

Mobility and maritime supply chains

Vehicle assembly, manufacturing expansion and shipbuilding orders create distinct industrial participation routes. Their economic significance depends on the stage reached and the sourcing needs of each production programme. [22][23]

Example	Verified stage	Implication for suppliers
Lucid AMP-2, KAEC	Existing assembly; expansion moving from construction into industrialisation in Q2 2026	Separate current assembly demand from future full manufacturing
IMI, Ras Al-Khair	Six bulk carriers ordered in October 2025	Order evidence; no assumption that vessels were delivered
Transport equipment imports	SAR 129.6bn in 2025	Vehicles, aircraft, vessels and associated equipment combined

Sources [8], [22], [23]

The broad transport-equipment import category provides scale context but does not isolate automotive components, aircraft maintenance or shipbuilding purchases. Company sourcing programmes and technical specifications are the relevant evidence for a component-level entry case. [8][22][23]

Qualification before scale

A local manufacturing presence follows investment registration and relevant activity permissions. Product conformity and customer approval are separate requirements. For automotive, aerospace or maritime applications, customer quality systems and applicable safety approvals should be identified at the programme level. [39][40][45]

Ras Al-Khair combines mineral-processing and maritime infrastructure within an industrial-city setting. KAEC provides a different location for vehicle operations on the western coast. Neither location implies that every future announced production capacity is already operational. [19][22][23]

> 2FAST interpretation: begin with a defined bill-of-materials or service requirement, prototype validation and a credible production ramp. Match investment commitments to firm programme milestones and customer qualification.

SECTOR 4 ENERGY AND WATER

Utilities enabling industrial growth

Energy and water infrastructure supports industrial and urban activity, while project procurement creates demand for equipment, engineering and operations. Capacity, contracts and actual output require separate treatment. [24][25]

Published evidence	Measure	Stage and date
Five renewable projects awarded	4.5 GW	Award announcement · 2025
Renewables connected to grid	12.3 GW	Operating-capacity snapshot in cited 2025 announcement
Signed renewable capacity	43.2 GW	Contracted portfolio at same announcement
Eastern Region desalination	About 3.0m m³/day	Capacity reported February 2026

Sources [24], [25]

The renewable figures refer to the dated procurement announcement and are not presented as a complete November 2026 asset inventory. Contracted and operating projects overlap; adding the categories would double count capacity. Gigawatts describe capacity, whereas electricity generation is measured over a period. [24]

The Saudi Water Authority's Eastern Region disclosure provides a capacity measure for desalinated water. Transmission and production capacities are related but distinct. A project's specified daily capacity does not establish its actual daily output or utilisation. [25]

Routes into utility value chains

Route	Evidence needed before commitment
Equipment and components	Tender specification, approved manufacturer status and warranty scope
Engineering and construction	Award status, package boundaries and construction timetable
Operations and efficiency services	Asset commissioning, operating contract and performance baseline

> 2FAST interpretation: link proposals to an identified asset and procurement package. Local service capacity, spare-parts availability and measurable operating performance can shape the supplier case alongside equipment pricing.

SECTOR 5 LOGISTICS

Gateway infrastructure and mobility

Saudi airports handled 140.9 million passenger movements in 2025. Mawani-supervised ports processed 8.32 million TEU, including 1.93 million transshipment TEU. These indicators show transport activity across different operating systems. [26][27]

King Abdullah Port, 28 July 2015. Archival photograph of port infrastructure; it is not evidence of current throughput. HUTA Group photographer / CC BY-SA 4.0. [56]

Airport indicator	2025 passenger movements
International / domestic	75.8m / 65.1m
Jeddah / Riyadh / Dammam	53.5m / 40.8m / 13.7m

Sources [26]

Airport passenger movements are not unique tourists, and TEU are container-equivalent units rather than cargo value or tonnes. Mawani totals cover its supervised ports; the archival port photograph is illustrative and does not extend the statistical perimeter. [26][27]

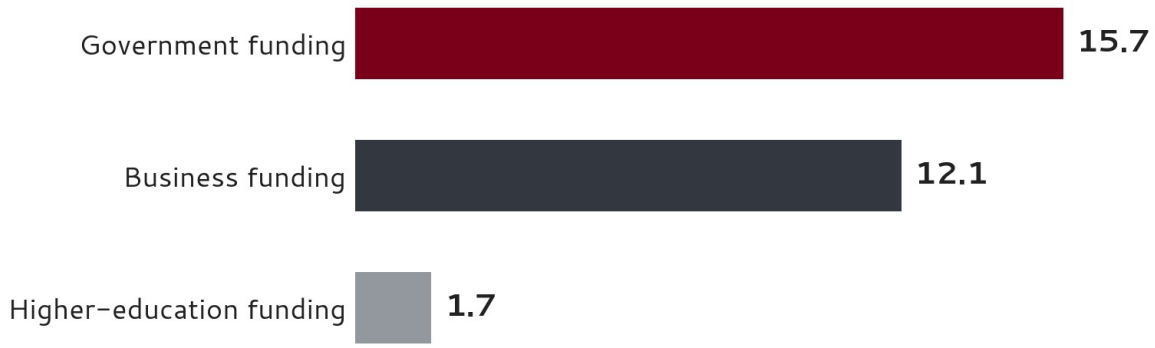
Transport services imports reached SAR 133.7 billion in 2025. Shipping, aviation and inland transport have different cost structures and contracting models, so their aggregate value is a starting point for analysis rather than a single market opportunity. [11]

> 2FAST interpretation: validate the route, handling requirement and service standard. Cold-chain, industrial cargo, warehousing and passenger services each require distinct assets, licences and customer relationships.

Digital reach and productive adoption

The ICT market reached SAR 199 billion in 2025 according to CST. GASTAT's 2026 ICT release reports internet use by 99.6% of individuals aged 15–74. Market revenue, household use and AI adoption are separate indicators. [30][31]

Sources of research and development funding



2024 · SAR billion · Funding source, not performing institution. Total: SAR 29.48bn. [32]

R&D expenditure reached SAR 29.48 billion in 2024. Government supplied SAR 15.69 billion of funding, business SAR 12.10 billion and higher education SAR 1.69 billion. The distribution of who funds research differs from the distribution of where research is performed. [32]

The services accounts record SAR 16.9 billion of telecommunications, computer and information imports and SAR 9.3 billion of exports in 2025. These are cross-border services flows, rather than the total domestic ICT market or revenues attributable solely to artificial intelligence. [11]

Participation and implementation

Digital services require activity-specific registration and permissions; technical implementation should also identify the customer's data, security and operating requirements. Research partnerships can connect a defined industrial or service problem with specialist expertise and demonstrable deployment. [39][40]

> 2FAST interpretation: quantify a use case through operating performance—such as service time, equipment availability or process accuracy. Confirm the data rights, integration work and support model before treating adoption interest as contracted demand.

SECTOR 7 ESSENTIAL MARKETS

Healthcare and food value chains

Healthcare access and household food consumption support recurring demand, with product regulation and distribution capabilities shaping participation. The two markets share service and supply-chain requirements while retaining distinct technical rules. [4][6][49]

Demand or capability signal	Published observation	Boundary
Healthcare service coverage	97.5% of population centres · 2025	Access indicator, not private market revenue
Food and beverage spending weight	27.9% · household monetary spending, 2023	Survey structure, not 2026 sales growth
Prepared foods, beverages and tobacco imports	SAR 40.4bn · 2025	HS category includes tobacco
Almarai sales / capital expenditure	SAR 22.1bn / 4.4bn · 2025	Regional group, not national sector totals

Sources [4], [6], [8], [33]

Almarai's disclosures illustrate the scale of an integrated food producer and its actual annual investment. These company values should not be combined with import totals to estimate Saudi food demand, because company geography and transaction boundaries differ. [33]

Regulated products and reliable delivery

Medical-device access depends on the device, establishment role and applicable SFDA authorisation and import procedures. A general investment registration or ordinary product-conformity certificate does not replace the specialised health-product route. [39][45][49]

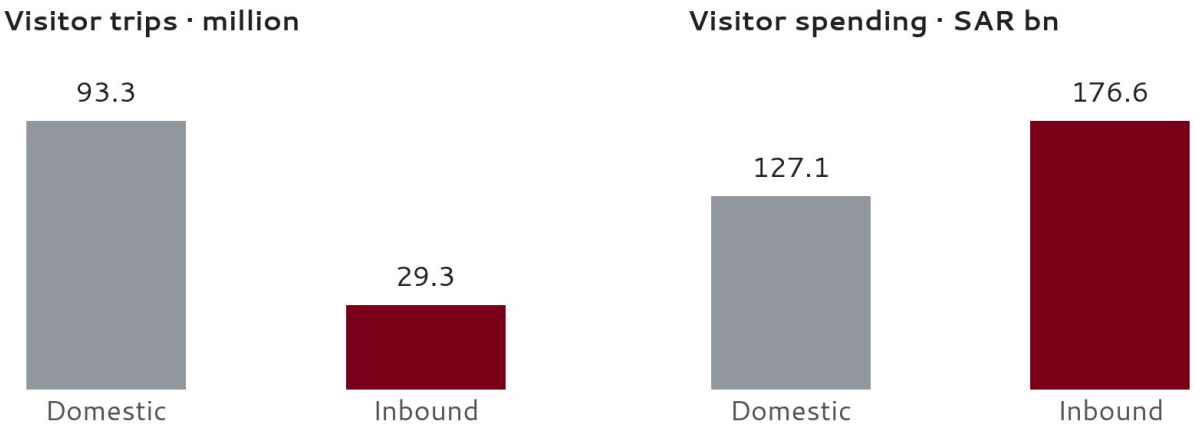
For food and consumer products, HS-level demand, formulation, labelling, storage and distribution arrangements determine the practical proposition. The national household survey describes spending patterns; channel research and customer validation are needed to establish current category volumes. [6][8]

> 2FAST interpretation: develop the compliance, traceability and after-sales or cold-chain model with the product offering. Recurring demand is valuable when the supplier can meet the service conditions of the specific buyer.

Visitor activity and destination operations

Tourism recorded 122.6 million visitor trips and SAR 303.7 billion of expenditure in 2025. Domestic travel and inbound visitors contribute differently to volume, spending and the requirements of destination operators. [34]

Tourism volume and spending by visitor group



2025 · Left: million trips. Right: SAR billion. Trips are not unique people; panels use different units. [34]

Domestic tourism accounted for 93.3 million trips and SAR 127.1 billion of spending; inbound tourism recorded 29.3 million trips and SAR 176.6 billion. These survey measures differ from the SAR 159.9 billion of travel-service exports reported in the balance-of-payments framework. [34] [11]

Red Sea Global's May 2026 statement reported eleven hotels open at its destination. Red Sea International Airport began domestic services in 2023 and international services in 2024. These are operating milestones, distinct from the full planned destination portfolio. [35][36]

Supply to operating destinations

Accommodation, food service, facilities management, visitor transport and cultural experiences have different customers and permit requirements. Operating hotels create a recurring service cycle, while properties still under development generate design, fit-out and commissioning requirements. [35][39][40]

> 2FAST interpretation: segment by visitor purpose, location and operating season. Establish whether the buyer needs construction-stage supply, pre-opening support or continuing hotel operations before selecting the route to market.

REGIONAL MARKET DEVELOPMENT

Location follows the value chain

Saudi participation pathways extend beyond the largest cities. The guide links selected centres to documented capabilities; it is not a ranking of administrative regions or a claim that every activity is available at every site. [18][19][21][22][28][35][37][38]

ID	Centre or cluster	Documented economic anchor	Participation focus[1]
1	Riyadh city	Corporate and metropolitan services; operating metro	Business services, mobility and urban operations
2	Eastern coastal cluster	Dammam gateway; Jubail process industries; Ras Al-Khair minerals and maritime	Industrial supply, maintenance and conversion
3	Jeddah and KAEC	Western gateway; vehicle assembly and manufacturing expansion	Distribution, components and operating services
4	Yanbu industrial city	RCJY industrial and process-production base	Industrial services and downstream applications
5	Hail city	MODON industrial facilities and food/materials activity	Production inputs, packaging and factory services
6	Northern phosphate chain	Maaden phosphate activities and development	Mining, processing and specialist equipment
7	Red Sea destination corridor	Operating hotels and destination airport	Hospitality operations and specialist services
8	Jazan industrial city	Primary and downstream industries; RCJY port	Industrial support and cargo services

Sources [18], [19], [21], [22], [26], [28], [35], [36], [37], [38]

[1] Participation focus is 2FAST interpretation of the cited capabilities, not a list of open tenders. Map markers are approximate. The Eastern cluster contains multiple cities; Jazan industrial city is distinct from Jazan city, approximately 70 kilometres to its south. [38]

A city label should not be used as a proxy for its administrative region's market. Site appraisal should verify the industrial authority, parcel, utility allocation, port or road access and recruitment catchment. Destination development likewise requires a property-level operating or construction status. [18][19][35][38]

> 2FAST interpretation: prepare a short list of sites only after fixing the customer geography and process requirements. A location's specialisation is useful evidence, while the specific site terms determine execution.

MARKET ENTRY

From investment registration to operation

The updated Investment Law establishes an investment-registration framework while retaining restricted-activity controls and sector requirements. The sequence should be designed around the actual business activity and investor structure. [39][40]

Step	Planning action	Evidence or authority
1 · Define activity	Identify products, services, investor structure and applicable activity conditions	MISA law and implementing regulations
2 · Register investment	Complete the applicable foreign-investor registration and supporting documentation	MISA / Invest Saudi service
3 · Establish the entity	Complete the relevant company and commercial-registration procedures	Commercial registration and company requirements
4 · Secure operational approvals	Obtain sector, site, municipal and technical permissions applicable to the activity	Relevant sector and local authorities
5 · Prepare delivery	Complete product, tax, employment and procurement readiness	ZATCA, HRSD, SASO/SFDA and buyer requirements

Sources [39], [40], [41], [42], [43], [44], [45], [49]

The law protects investment rights and provides a registration route, but it does not remove activity restrictions or confer every operating licence. Foreign ownership conditions must be checked for the selected activity; a blanket statement that all activities permit the same ownership or capital structure would be inaccurate. [39][40]

The registration service identifies supporting corporate and financial documentation for eligible applicants. The Ministry of Commerce provides company establishment through the Saudi Business Center. Entity formation, premises and specialised permissions involve separate decisions; published service times are not guaranteed end-to-end launch dates. [41][61][62]

Choose a presence that matches delivery

A distributor relationship, local service entity, joint venture or factory entails different contractual and operating obligations. The correct route depends on where the product or service is supplied, who holds customer contracts and which party carries regulatory responsibility. [39][40]

> 2FAST interpretation: create one activity-specific establishment plan with a named authority and evidence requirement for each step. Confirm the permission chain before committing to a site or promising a delivery date.

ENABLERS OF BUSINESS SUCCESS

Tax and operating requirements

The practical operating framework combines tax treatment, product classification, workforce planning and procurement conditions. Requirements vary by legal structure, activity and product; the following is a planning map of the verified public framework. [42][43][44][45][46][58]

Area	Verified framework	Application to a project
Corporate income tax	General 20% rate for the relevant non-Saudi taxable share; special regimes differ [42]	Determine ownership, tax base and activity treatment
VAT	15% standard rate; zero-rated and exempt supplies exist [43]	Classify supplies, registration and recoverable input tax
Customs	Integrated GCC tariff at 12-digit level; product-specific classification [58]	Confirm HS code, origin, customs value and procedure
Employment	Qiwa documentation and activity/occupation-specific localisation [44]	Plan roles, contracts and eligibility for counting
Product conformity	SABER route depends on technical regulation; shipment certification within SASO scope [45,57]	Confirm product certificate or declaration and shipment steps
Local content	Mandatory lists and procurement preference mechanisms [46]	Read the buyer's tender and applicable calculation rules
Specialised products	SFDA route for regulated health products [49]	Identify authorised party, product permission and import requirements

National-product price preference in public procurement is an evaluation mechanism, not an import tariff or a promise of award. Local-content obligations should be read in the tender and applicable rules; a programme's conditions cannot be generalised to every private-sector purchase. [46]

Withholding, zakat, treaty treatment and cross-border service structures require assessment against the chosen transaction and taxpayer position. This report does not assign a universal rate to these matters. Similarly, ordinary product conformity should not replace a specialised regulator's approval. [42][45][49]

> 2FAST interpretation: test the landed cost and delivery workflow using the actual product and entity. Assign responsibility for every certificate, tax filing, workforce obligation and customer acceptance step.

INVESTMENT SUPPORT

Match support to project eligibility

Development finance, industrial incentives and serviced industrial locations provide different kinds of support. Each has an eligibility and approval route; published programme limits are not amounts automatically available to an applicant. [18][19][47][48]

Route	Published feature	Eligibility and status
SIDF project finance	Project-based development finance; appraisal of technical, financial and market viability	Live programme reviewed; terms depend on project and approval
Standard industrial incentives	Up to 35% of eligible initial investment, capped at SAR 50m	Published programme; targeted activities and milestones. Current application window must be confirmed
Industrial-city location	RCJY industrial infrastructure and city-specific investor process	Site, activity, utilities and approvals assessed by authority
Special economic-zone route	Eligible sector, sufficient capital, environmental compliance and knowledge transfer	Annual substance requirements include premises/assets, personnel in the zone and operating expenditure

Sources [18], [19], [47], [48], [59], [60], [63]

SIDF financing is distinct from grant support. An applicant needs a commercially and technically appraisable project. Standard industrial incentives are disbursed against construction and operating milestones; full project funding and sufficient liquidity are required, and missed conditions can lead to recovery of support. [47][48][63]

A zone or industrial-city location should be evaluated for operational fit as well as incentives. Zone eligibility and annual economic-substance requirements are distinct from the general investment-registration route. The applicable rules and award document establish a project's entitlement; a programme is not assumed continuously open. [18][19][59][60][63]

Prepare an appraisable investment case

Define customer evidence, production process, utility needs, financing structure and implementation milestones. Link each requested support item to an eligible cost or activity, and retain the authority's written confirmation in the project record.

Project milestones that matter

Selected examples illustrate the difference between an operating asset, an awarded order and an expansion under implementation. The dates below identify the evidence snapshot; they do not imply a full audit of every later milestone. [22][23][24][29][35][36]

Riyadh Metro, photograph captioned 2024. SPA via Wikimedia Commons / CC BY-SA 4.0. The six-line operating milestone followed in January 2025. [55][29]

Example	Evidence date	Verified stage
Riyadh Metro	January 2025	All six lines operating; 176 km network
Red Sea destination	May 2026	Developer reported eleven hotels open
Red Sea International Airport	2023 / 2024	Domestic / international service launches
Lucid AMP-2 expansion	Q2 2026 disclosure	Construction progressing to industrialisation and commissioning work
IMI six bulk carriers	October 2025	Signed order; deliveries not inferred
Five renewable projects	2025 award	4.5 GW awarded; not assumed operational

Sources [22], [23], [24], [28], [29], [35], [36]

2FAST interpretation: the next verified milestone determines the relevant demand. Operating assets need recurring services; commissioning needs integration and acceptance; awards require procurement-package verification before they become a supplier pipeline.

INVESTMENT PATHWAYS

Turn evidence into a participation case

The evidence supports several routes into the Saudi market. Route selection should start with a specific buyer need, then align the local presence and capital commitment with the activity's commercial and regulatory requirements. [8][11][17][39][40]

Pathway	Evidence to establish	Operational preparation
Export and distribution	Product-level demand, customer segment and channel coverage	Importer responsibility, conformity, inventory and after-sales service
Industrial supply	Named plant, approved specification and procurement timetable	Qualification, testing, local support and reliability
Specialised services	Defined client workflow, deliverables and contracting entity	Professional permissions, delivery team and knowledge transfer
Partnership or joint venture	Complementary capability and agreed customer access	Governance, responsibilities and performance obligations
Local manufacturing	Sustained customer demand, process economics and site feasibility	Industrial permissions, utilities, workforce and commissioning
Eligible infrastructure or investment project	Documented programme, award or concession terms	Financial appraisal, approvals and milestone-based execution

Evidence sequence for commercial development

Start with the relevant product or service definition. Verify the customer and procurement route, then test price, performance and delivery requirements. Assess the legal and operational setup only against that concrete business model. This sequence reduces the gap between a national market indicator and an executable investment proposition.

The sector evidence in this report identifies economic activity and capabilities. It does not certify open tenders, exclusive rights, guaranteed offtake or investment returns. Those outcomes require project- and counterparty-specific evidence.

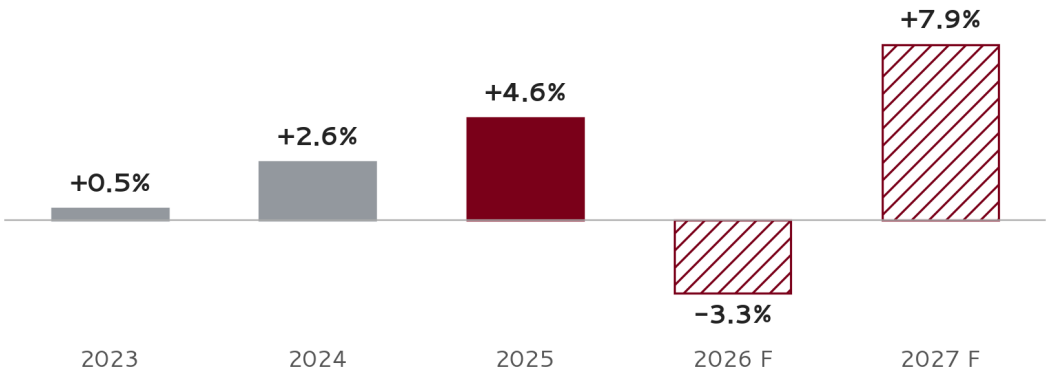
2FAST interpretation: a credible participation case states who buys, why the offer is needed, how it will be delivered, which approvals apply and what evidence supports each assumption.

PUBLISHED OUTLOOK

Growth pathways and planning assumptions

The latest published forecasts anticipate a weak 2026 headline result followed by a 2027 recovery. Non-oil activity, capital formation and service delivery remain central to the medium-term market, while annual outcomes depend on the underlying forecast assumptions. [15][50]

Real GDP growth and published forecasts



Percent year-on-year · IMF October 2026 vintage. Solid bars: published historical estimates. Hatched bars: forecasts. [50]

Publisher and vintage	2026	2027	Definition
IMF · October 2026	-3.3%	+7.9%	Real GDP growth
MoF · September 2026	-3.6%	Not reproduced	Real GDP estimate
MoF · September 2026	+3.2%	Not reproduced	Non-oil growth estimate

Sources [15], [50]

The IMF's October release supersedes its July projections. The forecast rebound follows a contraction and anticipated normalisation; individual industries will differ. Q3 flash growth is a partial-year observation, distinct from the full-year forecast. [2][50]

The FY2027 pre-budget statement sets out a prospective expenditure envelope of SAR 1,392 billion. Project execution, visitor activity and industrial operations translate this broader economic setting into individual market requirements, with different delivery dates and contracting entities. [15][17][34]

> 2FAST interpretation: use the published outlook as a planning reference, then test sales and investment decisions against customer commitments, delivery schedules, funding conditions and operational performance.

Definitions and evidence boundaries

This report uses primary statistical releases, official regulatory material and original company disclosures published or available by 1 November 2026. It keeps the observation period separate from the publication or retrieval date.

Topic	Treatment
GDP	Current prices for scale and shares; chain-linked 2023-reference volumes for real growth. No summing of chain-linked components.
Trade and investment	Customs goods and BPM6 services stay separate. FDI flows, stock and project records are distinct.
People and geography	Nationality and age denominators are explicit. Household data are not salaries. City, region and industrial site are not interchangeable.
Plans and projects	Targets, forecasts, awards, implementation and operation are labelled. Dated project snapshots are not a complete live inventory.
Calculations and references	SAR is the domestic base. USD conversions use SAR 3.75/USD. Workbook retains input values, formulas, definitions and source links.

The annual FDI release published in October 2026 supersedes the earlier quarterly vintage for the 2025 total. Latest flash GDP may revise quarterly growth before detailed tables are updated. Population uses the latest complete publication validated here, mid-2024; household income uses the 2023 survey. These lags are retained rather than filled with unverified estimates. [1][2][5][6][12][13]

Photographs and map

Cover: KAFD, Riyadh, 2026. Saudi Press Agency via Wikimedia Commons; photographer not named. EXIF records 2 May 2026. [54] Page 19: King Abdullah Port, 28 July 2015, HUTA Group photographer; archival image. [56] Page 27: Riyadh Metro, captioned 2024, Saudi Press Agency via Wikimedia Commons; exact capture day unspecified. [55]

All three photographs: Creative Commons Attribution–ShareAlike 4.0, https://creativecommons.org/licenses/by-sa/4.0/. Resized for layout, with original aspect ratios retained. Original image licences remain applicable; no endorsement is implied. Country outline: Natural Earth, public domain. Markers are approximate. Chart and map source files accompany the report.

Numbered references on pages 31–34 are clickable. Full URLs, evidence statements and calculation inputs are provided in the workbook. Where a source does not state a publication day, the register identifies that limitation instead of assigning one.

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