



وزارة الاستثمار  
Ministry of Investment



# Water Sector in the Kingdom of Saudi Arabia

## Value Proposition



# Why Saudi Arabia is an Investment Target?



Sector Growth and Water Market Boom



Privatization and Localization Plan and Opportunities



Saudi Arabia Located in the Middle of the World



Well Developed ecosystem and Supportive Incentives



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KSA is the largest country in terms of desalination capacity in the world

## Total desalination capacity

(SWA, SWPC, Marafiq and others)

12+ Million Metric Cube per Day

### KSA share of the Desalination capacity



22%

of worldwide capacity



54%

of GCC capacity





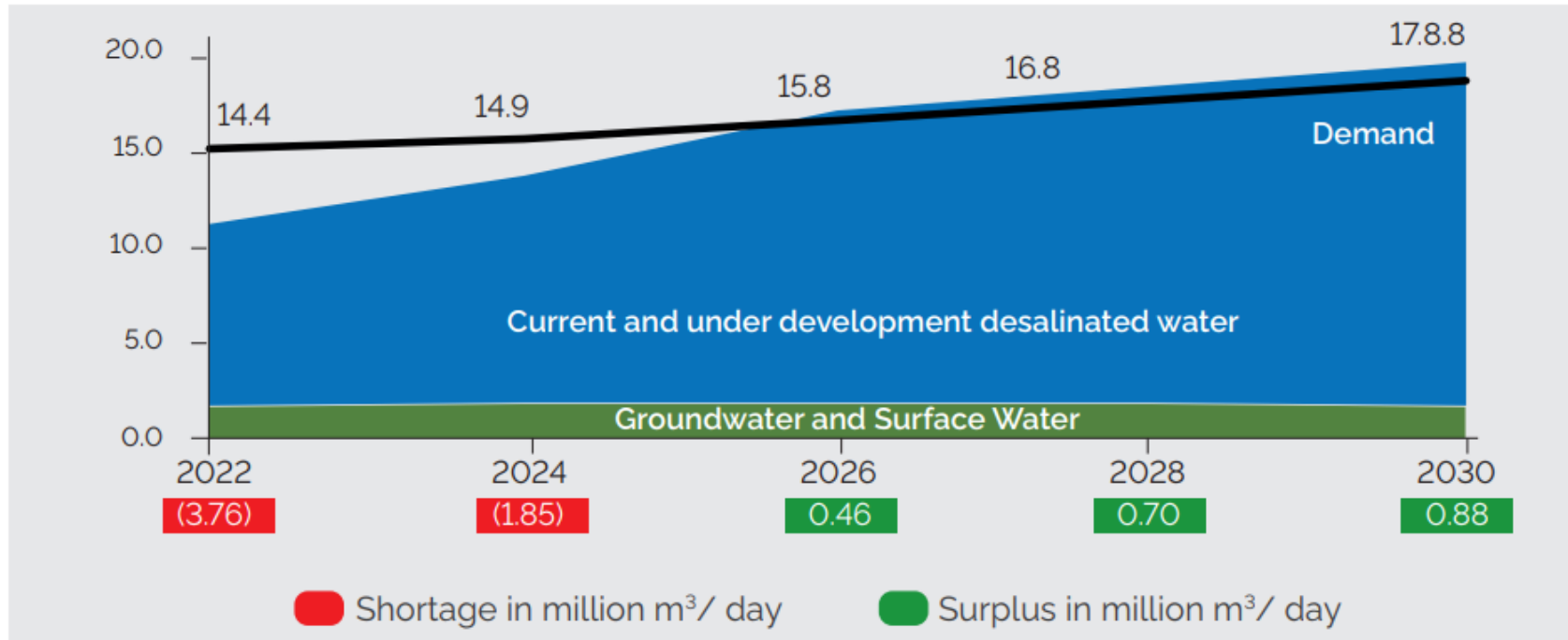
## Sector Growth and Water Market Boom

Saudi Arabia



### KSA Desalination Supply, Demand and Gap

(Million m<sup>3</sup>/d)



**38% increase**  
From 12M m<sup>3</sup>/d to 16.6M m<sup>3</sup>/d

Within the 43+ projects in coming years up to 2030

Source: MEWA

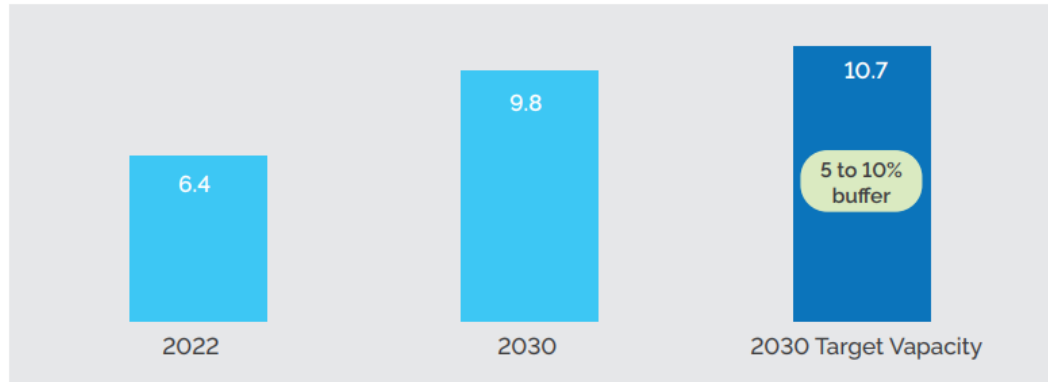




## Sector Growth and Water Market Boom Saudi Arabia



Wastewater Collected for Treatment and Required Capacity  
(Million m<sup>3</sup>/d)



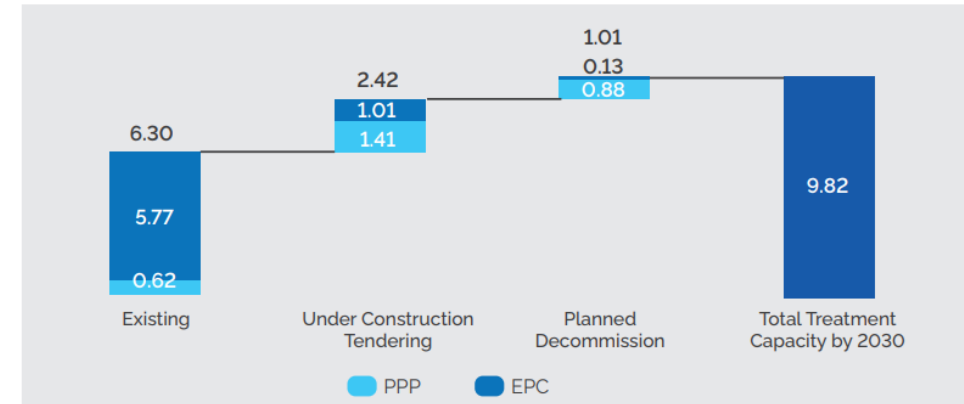
Source: MEWA, NWC

**67% increase**

**From 6.4M m<sup>3</sup>/d to 10.7M m<sup>3</sup>/d**

Within the 43+ projects in coming years up to 2030

Total Wastewater Treatment Capacity by 2030  
(Million m<sup>3</sup>/d)



Source: MEWA, NWC

**55% increase**

**From 6.3M m<sup>3</sup>/d to 9.82M m<sup>3</sup>/d**

Within the 43+ projects in coming years up to 2030

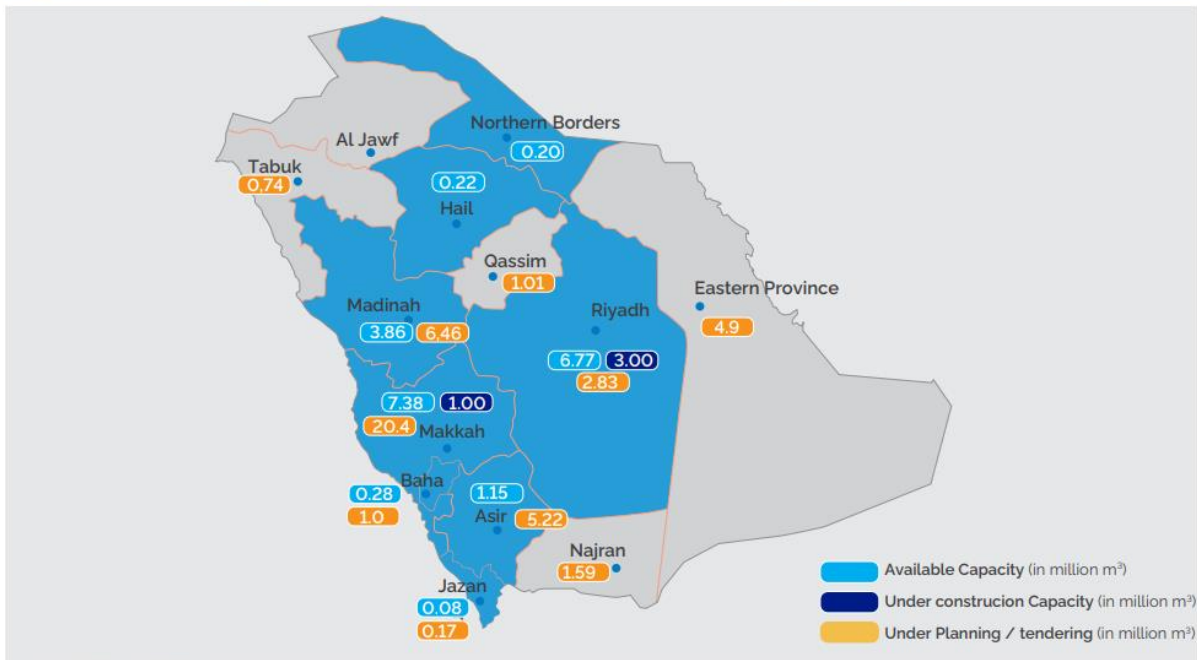




## Sector Growth and Water Market Boom Saudi Arabia



### Existing, Under Construction and Under Planning Strategic Reservoirs in KSA



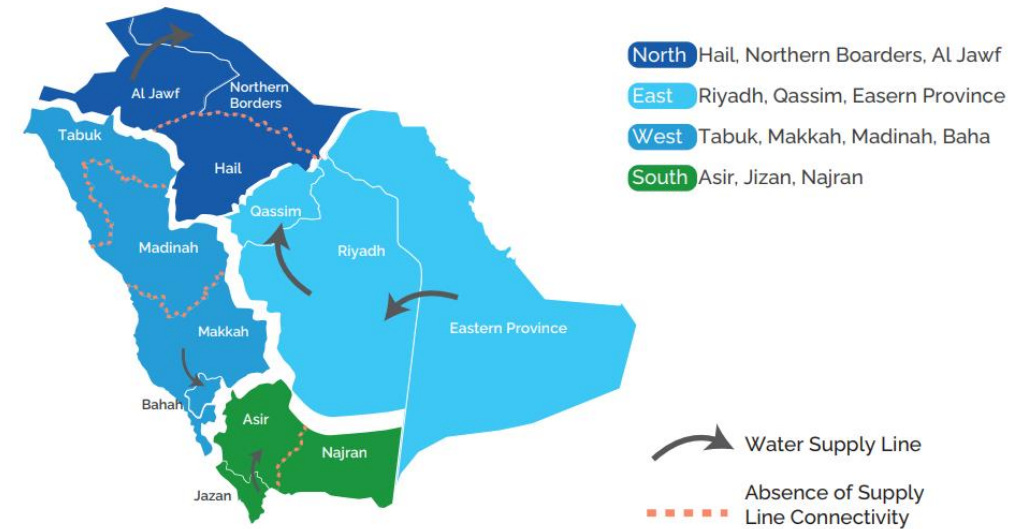
Source: MEWA, NWC

### 10+ Projects

From 23.3M m³/d to 45.75M m³/d

Within the 43+ projects in coming years up to 2030

### Transmission Lines



### 10+ Projects

About 4.9M m³/d and 4550 km

Within the 43+ projects in coming years up to 2030



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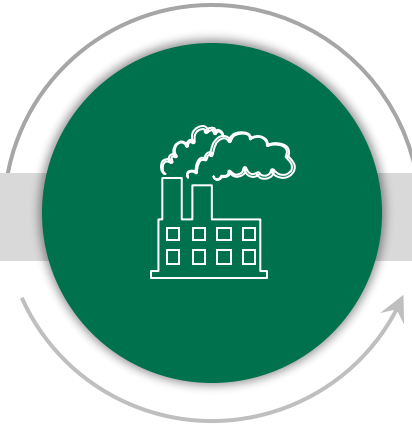
## Privatization and Localization Plan and Opportunities

Saudi Arabia



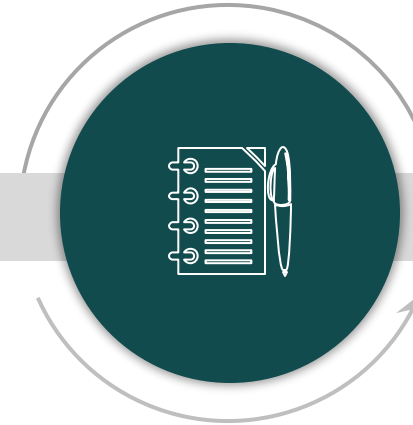
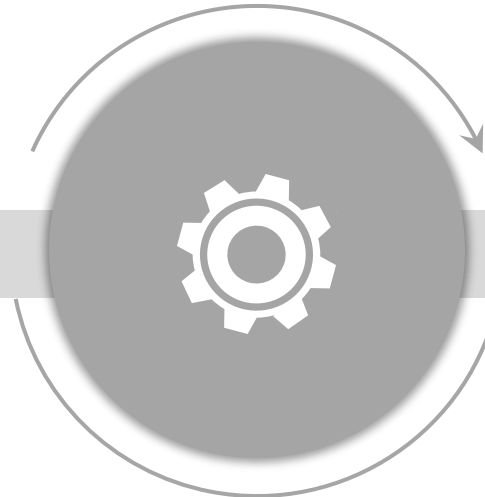
### Manufacturers

can produce equipment and chemicals used  
in water sector



### Developers

can build, own and operate  
new water sector projects

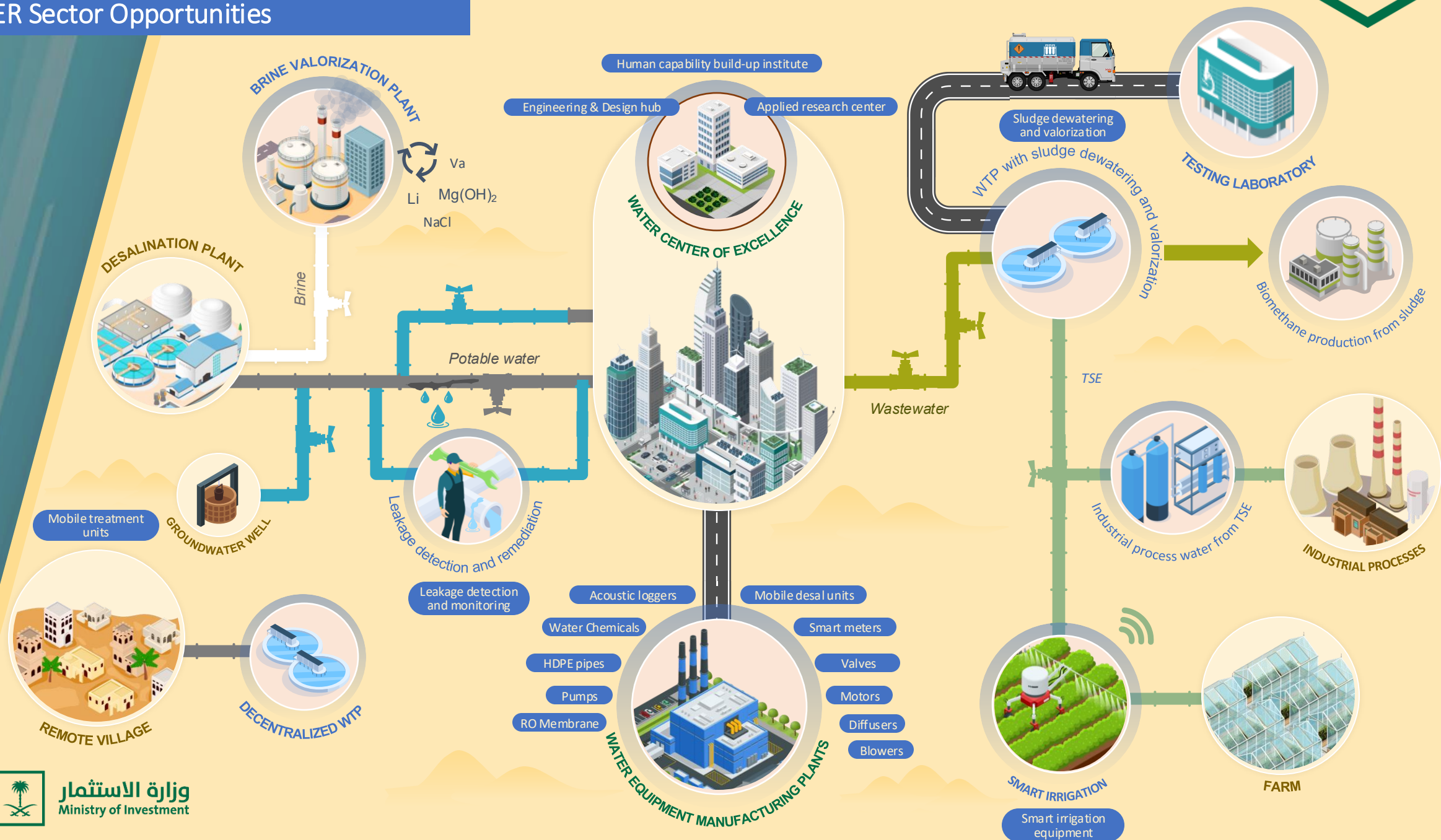


### Other Investors

can provide services including brine  
extraction, training services, workshops  
& other innovative solutions and  
technologies



# WATER Sector Opportunities



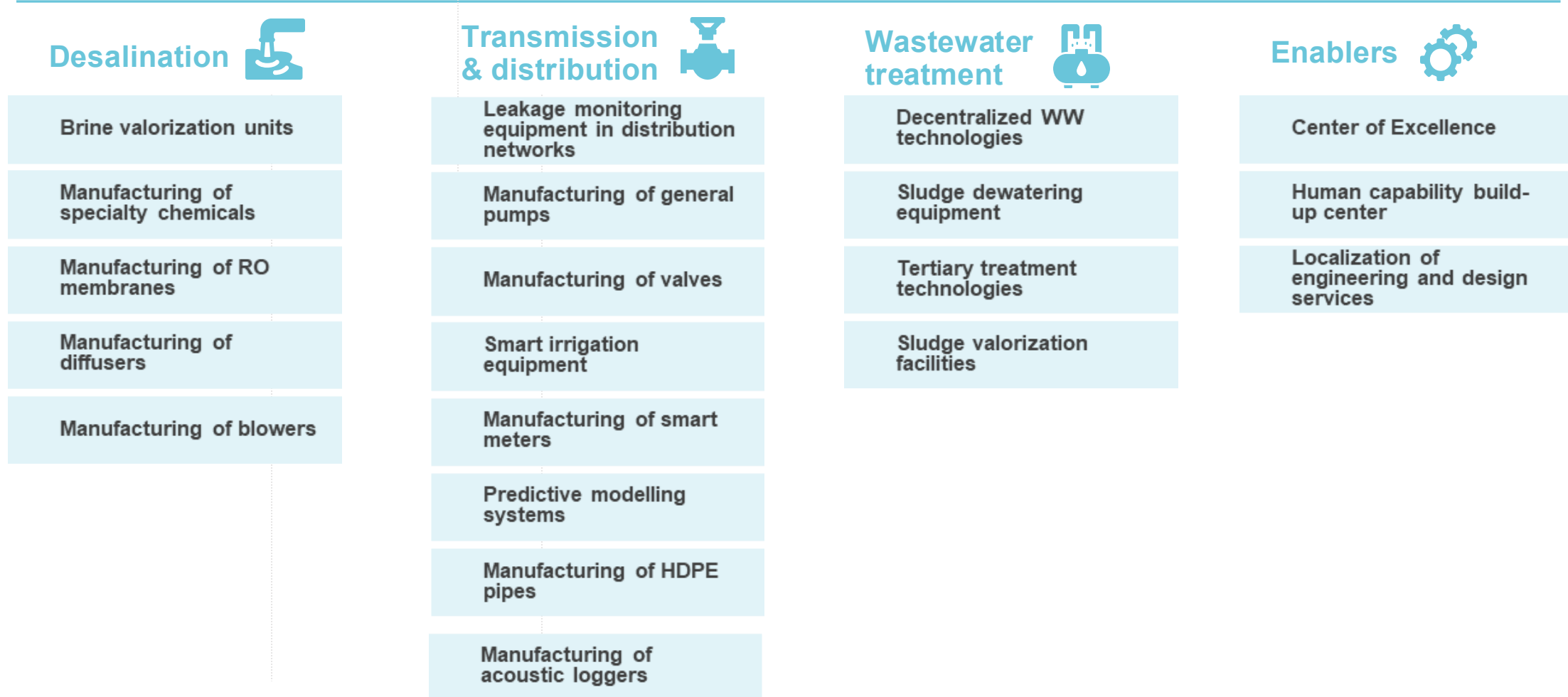


## Example of Potential investment opportunities

Saudi Arabia



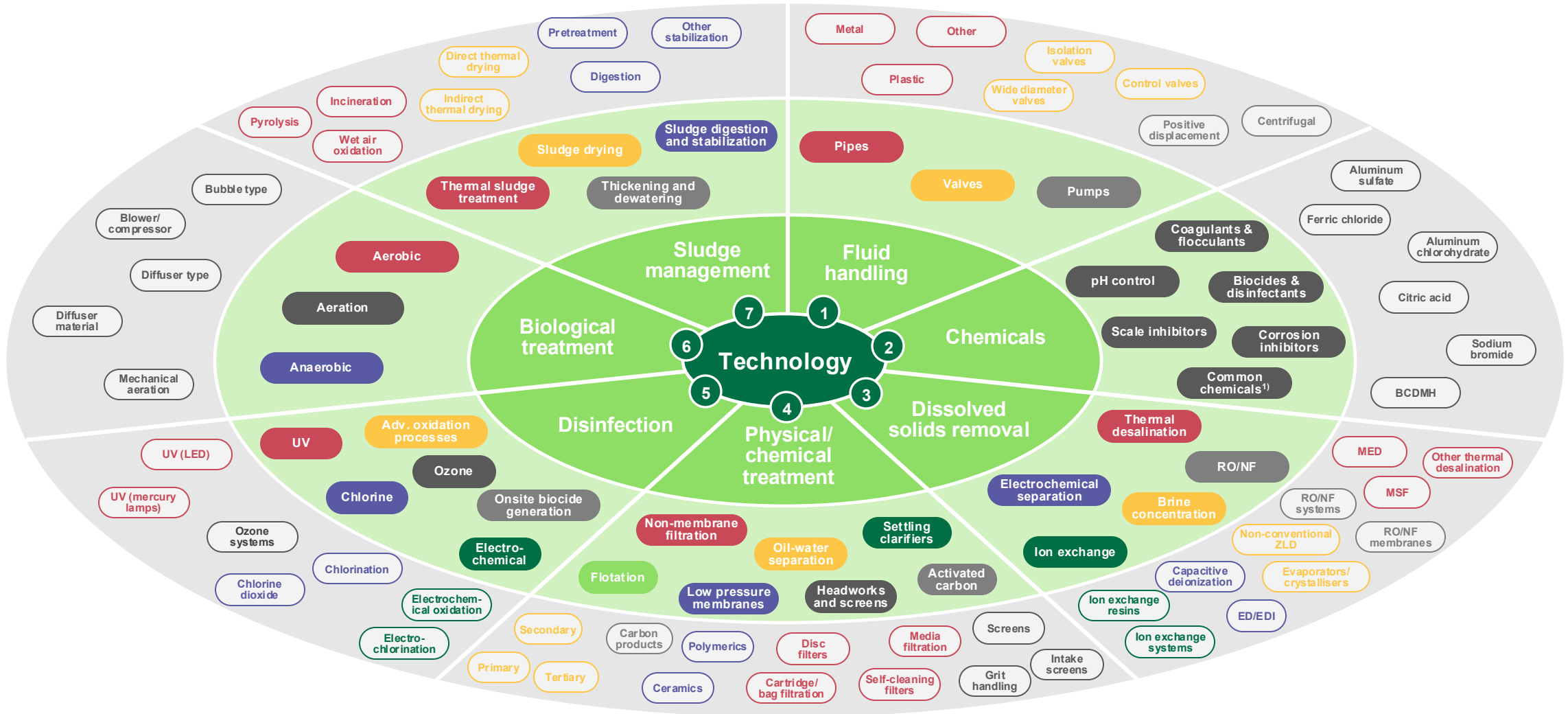
### Water value chain





# Multiple technologies are required to be deployed in the water sector – Potential for localization and innovation to be identified for each

## Overview of equipment & chemicals





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Public / متاح

Access to a vast number of consumers within 7 hours of air transport



10 main harbors



27 airports



>1,700 km of rails



>200,000 km of roads



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## Investor-centric ecosystem is established by the government for private sector investors

Saudi Arabia



### Clear governance and regulatory framework

In addition, water R&D capabilities  
currently exist in the kingdom



### Incentives and enablers

With competitive prices to attract  
private sector investors



Water Technology Innovation Institute  
& Research Advancement



KACST Water Research  
Institute



KAUST Water Desalination  
and Reuse Center



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Ministry of Investment



من صندوق تنمية الموارد البشرية



هيئة الزكاة والضريبة والجمارك  
Zakat, Tax and Customs Authority





## Saudi offers a wide range of investor-centric incentives



Custom duty exemption



Customs duty exemptions for primary raw materials, manufacturing equipment, and spare parts (not available in KSA)



Custom duty drawback



Refund to importers/ exporters of raw material imports that are processed in Saudi Arabia and re-exported as more finished products



Loans



Up to 75% of project financing through soft loan by SIDF



Land incentives



Land for lease starting from \$ 0.26 per sqm



Nationalization incentives



Up to 15% (for male) and 20% (for female) of the monthly salaries of KSA nationals employees to be covered by HRDF



Ownership



100% foreign direct ownership allowed



Repatriation of capital



No restrictions on repatriation of capital



# INVEST SAUDI ONLINE PORTAL

WE HAVE DEVELOPED AN ONLINE PORTAL TO ASSIST YOU ON YOUR JOURNEY



INVESTOR SERVICES  
MANUAL



INVESTMENT LICENSE  
CHECK



INVESTOR JOURNEY  
GUIDELINES

MISA



INVESTSAUDI







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Thank You