



الهيئة السعودية للمياه
Saudi Water Authority

KSA Water Sector

What Makes Saudi Arabia a Leading Destination for Investment

Overview | May 2026



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01

The Strategic Importance of Saudi Arabia's Water Sector

02

Sector Scale, Growth Drivers, and Market Dynamics

03

Investment Environment and Opportunities

04

Why Invest Now: KSA's Value Proposition to Investors



Globally leading water system at unparalleled scale and complexity

KSA operates one of
the largest and most
advanced water
systems in the world



World-Leading Achievements Enabled by Vision 2030 and the National Water Strategy

Infrastructure Capacity & Resilience

Networked Residential Unit

(million)

8.8 → 12.8 (+4)
2016 2025

Transmission Pipeline Lengths

(1,000 km)

7 → 18 (+150%)
2016 2025

Additional Strategic Storage

(days)

0.4 → 2.9 (+620%)
2016 2025

Seawater Desalination Capacity

(million m3/day)

5.6 → 11.8 (+110%)
2016 2025

Operational Performance

Percentage of Water Loss

(%)

41 → 36 (-4%)
2019 2025

Avg. Cost of a Unit of Production from Seawater

(SAR/M3)

3.0 → 1.26 (-58%)
2016 2025

Energy Requirements for Seawater Production Unit

((kWh/m3)

16 → 2.34 (-86%)
2016 2025

Sustainability & Energy Transition

Amount of Reused Treated Wastewater

(million m3/day)

0.6 → 1.83 (+200%)
2016 2025

Renewable Energy Target Capacity

(MW)

10 → 439 (+235 in 2025)
2019 2030

Beneficiaries of Access to Sustainable Water Sources

(million)

13 → 28 (+14)
2016 2025



Sector Scale, Growth Drivers, and Market Dynamics

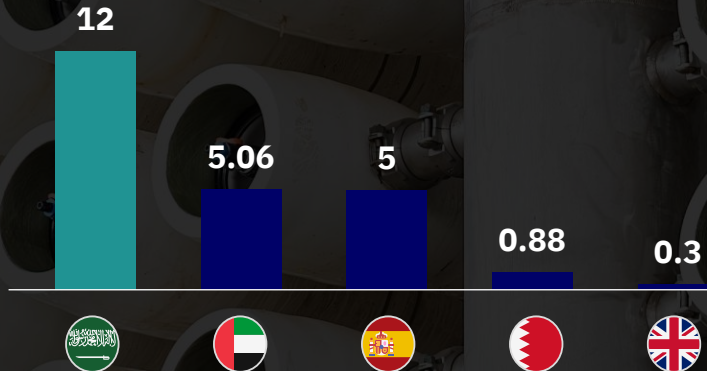
Unmatched scale, accelerating demand, and strong fundamentals are reshaping Saudi Arabia's water value chain

02



Saudi Arabia delivers ~15% of Global Desalinated Water Supply

Global Comparison | Total Desalination Capacity (million cubic meters per day, 2025)



80% of urban water supply

The total desalination capacity reached **12.0 million cubic meters per day in 2025.**

The total usable water reserves from dams are about 1.6 billion cubic meters per year.

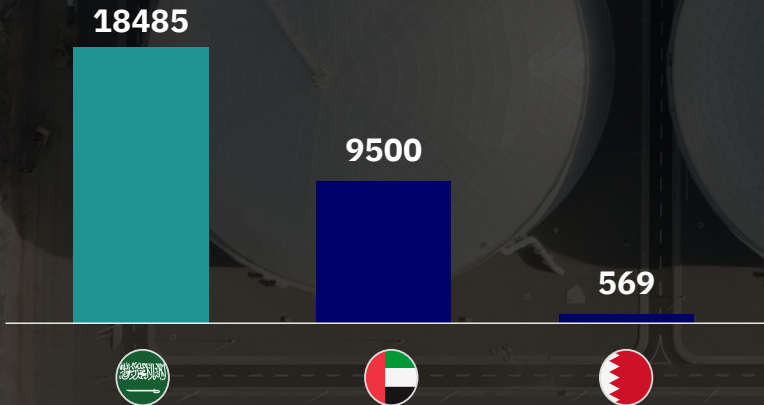
Over 110% growth in desalination capacity

More than doubled its desalination capacity, from **5.6 million m³/day in 2016 to 11.8 million m³/day in 2025**



A World-Leading Water Transportation System at Unmatched Scale

Global Comparison | Transmission Network (KM, 2025)



18,000+ km of Advanced Pipelines Supplying 17+ M. m³/Day

The transport capacity is equivalent to what fills a river with a length of 1070 between Taif and Lake Al-Ahsa with a width of 9 meters and a depth of two meters

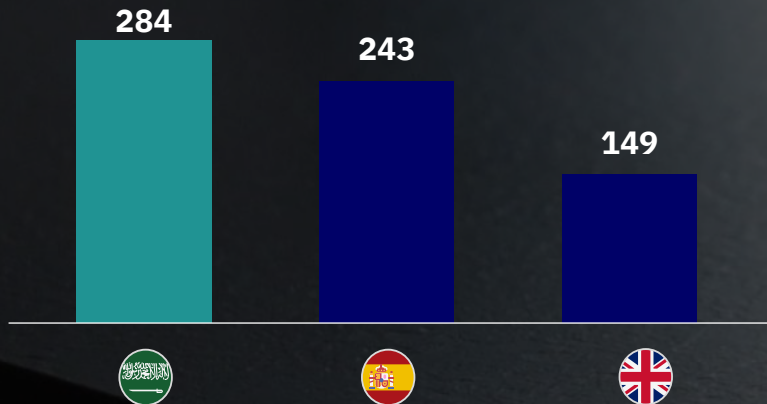
A 150% Expansion of KSA's Water Transmission Network

Saudi Arabia's water transmission network grew **from 7,000 km in 2016 to over 18,000 km by 2025**, enabling reliable long-distance water transport across diverse terrains



A Water Distribution System Delivering 12.6 Million m³ per Day

Global Comparison | Per-Capita Water Supply (liters/person/day)



Expanding Water and Sewage to 4+ Millions Households

Between 2016 and 2025, the Kingdom expanded water distribution coverage **from 8.8 million to 12.6 million households**, significantly strengthening access, reliability, and service levels nationwide.

A Water System Designed for High Per-Capita Demand

With per-capita water consumption of **284 liters per day**, Saudi Arabia's system delivers 19% more per person than Spain and 35% more than the UK, underscoring the scale of national water services.



Investment Environment and Opportunities

A robust policy and PPP framework enabling private sector participation, privatization, and localization at mega scale

03



Over SAR 179 bn in Planned Investment and Privatization Through 2030, Covering 2,100+ Projects

EPC, O&M & Privatization projects

Focused investments in desalination, water and wastewater treatment, transmission pipelines, storage, and irrigation infrastructure



Localization of manufacturing facilities, offices, and regional HQ

Manufacturing localization

Additional facilities

Value-adding services

Enabling opportunities



Public-Private Partnership (PPP) Projects

Projects tendered under PPP structures, including BOT and BOOT models

المركز الوطني للتخصيص
NATIONAL CENTER FOR PRIVATIZATION & PPP



شركة نقل وتكنولوجيا المياه
Water Transmission and Technology Co. (WTTTC)



Talent and Innovation as Catalysts for Localization

National talent development and continuous innovation drive localization, enabling technology adoption, local content growth, and a globally competitive water sector

~35

Private sector projects boosting investment and reducing public funding reliance

>65%

Localized water supply chains driving jobs, economic growth, and knowledge transfer

أكاديمية المياه
Water Academy



Empowering the next generation With Water Academy

A premier training academy developing and certifying professionals to shape the future of the water sector

990+

Incl. Specialized programs

16K+

Trainees in 2024



Driving World-Leading Water R&D and Innovation

Innovation Driving the Transition to Reverse Osmosis and Advanced Water Purification for a Sustainable Future

2.34 kWh/m³

Lowest energy consumption by a desalination plant

22%

Average capital Cost reduction



Why Now: Saudi Arabia's Investment Case for Global Investors

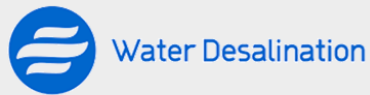
An investor-friendly ecosystem with incentives, strong institutions, and Saudi Arabia's strategic location enabling regional access

04

Investor-Ready National Water Ecosystem

A mature, investor-ready ecosystem supported by strong institutions, clear regulation, incentives, and partnerships, enabling efficient market entry, scalable projects, and long-term value creation for investors

Strong Water R&D Capabilities in KSA



SWCC Desalination Technologies Research Institute



KACST Water Research Institute



KAUST Water Desalination and Reuse Center



Clear Governance & Regulatory Framework



Key Incentives and Enabling Mechanisms

Competitive pricing designed to attract private sector investment



**هيئة الزكاة والضريبة والجمارك
Zakat, Tax and Customs Authority**





A Strategic Location Unlocking Regional Market Access

Unmatched Connectivity Through Ports, Airports, Rail and Road Infrastructure

- 10 main harbours
- 27 airports
- +1,700 km of railway network
- A road network exceeding 200,000 km

Unlocks access to major markets
and millions of consumers within a
seven-hour flight

Access to European markets within less than seven hours of flight time

Around 100 daily flights
connect Europe and Saudi
Arabia, enabling fast access
to key markets and efficient
supply chains.

Five-Hour Access to Over Half of the World's Population

Within a five-hour flight,
Saudi Arabia reaches over
50% of the global population
across Asia, Africa, and
Europe, positioning the
Kingdom as a strategic hub.



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Thank You

