

GCC Infrastructure Market Size & Share Analysis - Growth Trends and Forecast (2025 - 2030)

> ****Industry:**** Construction & Infrastructure (Real Estate & Construction)
> ****Source:**** https://www.mordorintelligence.com/industry-reports/gcc-infrastructure-market(https://www.mordorintelligence.com/industry-reports/gcc-infrastructure-market)
> ****Scraped Date:**** 2026-09-17

Executive Market Summary

Market Metric	Details
:---	:---
Base Market Size	USD 41.10 billion
Projected Forecast (2031)	USD 41.10 billion
Growth Rate (CAGR)	5.67 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

![Major players in GCC Infrastructure industry](images/chart_2.png)

![GCC Infrastructure Market (2025 - 2030)](images/chart_3.png)

![GCC Infrastructure Market: Market Share by Infrastructure Segment](images/chart_4.png)

![GCC Infrastructure Market: Market Share by Investment Source](images/chart_5.png)

![GCC Infrastructure Market Concentration](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

![Mordor Intelligence on Pinterest](images/chart_13.svg)

![Mordor Intelligence on Instagram](images/chart_14.svg)

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2019 - 2030 |
Forecast Data Period | 2025 - 2030 |
Historical Data Period | 2019 - 2023 |
Market Size (2025) | USD 41.10 Billion |
Market Size (2030) | USD 54.20 Billion |
Growth Rate (2025 - 2030) | 5.67 % |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

Market Overview

GCC Infrastructure Market Analysis by Mordor Intelligence
The GCC Infrastructure Market size is estimated at USD 41.10 billion in 2025, and is expected to reach USD 54.20 billion by 2030, at a CAGR of 5.67% during the forecast period (2025-2030). Government-driven diversification agendas, large-scale public funding, and broad economic liberalization are sustaining this trajectory. Transportation retains primacy through mega-projects such as the USD 7 billion GCC Railway and Saudi Arabia's USD 22.5 billion Riyadh Metro, yet utilities are scaling faster as water security and renewable energy goals reshape funding priorities. New construction dominates activity because of abundant land, smart-city ambitions, and incentive structures that reward greenfield approaches over retrofits. Financing innovation through sukuk, infrastructure bonds, and re-tooled PPP laws is broadening the investor base, while localization mandates ensure that value creation remains within member states. Moderate competitive intensity persists: the top 10 contractors captured 60% of contract value in 2024, but project pipelines remain large enough to accommodate both global tier-one firms and agile regional specialists.

Key Report Takeaways* By infrastructure segment, transportation captured 44.2% of GCC infrastructure market share in 2024, while utilities are forecast to expand at a 6.44% CAGR through 2030.

* By construction type, new builds accounted for 81.3% of the GCC infrastructure market size in 2024, whereas renovation projects are projected to rise at a 6.67% CAGR to 2030.

* By investment source, public funding held 74.7% of the GCC infrastructure market share in 2024, while private investment records the highest projected CAGR at 6.88% through 2030.

* By country, Saudi Arabia led with 74.9% of the GCC infrastructure market size in 2024, yet Qatar is expected to post the fastest 7.03% CAGR during 2025-2030.

Key Market Trends

Market Trends and Insights
Drivers Impact Analysis of GCC Infrastructure Market
rivers | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

Economic diversification agendas are pushing massive transport, tourism, and social infrastructure spend | +1.2% | Saudi Arabia, UAE, with spillover to Qatar and Kuwait | Long term (≥ 4 years) |

Population growth and urbanization are creating demand for housing, utilities, healthcare, and education assets | +0.8% | Region-wide urban centers | Medium term (2-4 years) |

Mega / giga-projects anchoring long-term capex pipelines | +0.6% | Saudi Arabia and UAE; Qatar secondary | Long term (≥ 4 years) |

Strategic energy and water security investments | +0.5% | All GCC focus on water-scarce areas | Medium term (2-4 years) |

Regional connectivity goals strengthening trade and logistics positioning | +0.4% | Cross-border initiatives, port cities | Long term (≥ 4 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The market remains moderately concentrated. Bechtel secured USD 8.5 billion in 2024 GCC awards, China State Construction Engineering Corp booked USD 12.2 billion, while Saudi Binladin Group retained USD 6.8 billion in domestic commitments. The top 10 players jointly control about 60% of awards, leaving ample room for mid-sized regional specialists to capture sub-USD 500 million packages. Different

iation hinges on BIM proficiency, AI-powered scheduling, and sustainability credentials aligned with government green mandates.

Localization beats as a core compliance lever. Saudi and UAE rules require 30-40 % local employment and rising local-content ratios. International EPCs form joint ventures, such as Vinci with Al Rajhi, to navigate local procurement rules while transferring know-how. Technology adoption offers bidders a margin edge; drone surveying, modular fabrication, and digital twins compress timelines and mitigate cost overruns, critical under fixed-price contracts.

Consolidation and partnerships continue. Global majors acquire niche water or renewable specialists to bolster utilities' credentials. Regional firms scale via M&A or secure preferred-bidder status on repeat frameworks. Emerging white space revolves around smart-city tech stacks, high-voltage transmission, and advanced desalination, where domain expertise outweighs price in tender scoring. The evolving field underscores a balanced mix of global capital, local insight, and digital prowess in the GCC infrastructure market.

GCC Infrastructure Industry Leaders* Saudi Binladin Group

- * Bechtel Corporation
- * China State Construction Engineering Corp (ME)
- * L&T Construction Middle East
- * Orascom Construction

* *Disclaimer: Major Players sorted in no particular order
Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

Component Component 3 Scope Of The Report Bottom

GCC Infrastructure Market Report ScopeBy Infrastructure SegmentTransportation Infrastructure |
Utilities Infrastructure |
Social Infrastructure |
Extraction Infrastructure |

Segmentation Accordion Item

By CountriesSaudi Arabia |
United Arab Emirates |
Qatar |
Kuwait |
Oman |
Bahrain |

Frequently Asked Questions

What is the projected value of the GCC infrastructure market in 2030?
The GCC infrastructure market is forecast to reach USD 54.2 billion by 2030.

Which segment is growing fastest within GCC infrastructure?
Utilities infrastructure is projected to post a 6.44% CAGR, making it the fastest-growing segment.

How dominant is public funding in GCC projects?
Public sources financed 74.7% of contracts in 2024, although private investment

is gaining momentum under revised PPP laws.

Which GCC country will grow its infrastructure spending quickest through 2030?

Qatar is expected to register the fastest 7.03% CAGR due to the North Field expansion and associated transport upgrades.