

2026 | PROJECTS INTELLIGENCE

MENA WATER & WASTEWATER PROJECTS MARKET



\$235 BN+

Market Size

with

\$140 BN+

Projects Pipeline

INCLUDES

**IRAN
CONFLICT
UPDATE**

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Water defines the Middle East and North Africa (MENA) in a way few other resources do. It shapes cities, budgets, diplomacy and daily life. MENA holds barely 1 per cent of the world's renewable freshwater, yet is home to almost 6 per cent of its population. That imbalance has pushed the region to build the world's most advanced desalination and water-reuse industry. Today, GCC countries alone account for close to half of the planet's desalinated water output. The engineering is remarkable.

Defining the Water Landscape in MENA

Understanding the water sector in the MENA region requires a clear definition of key terms that frame the discourse around its challenges and management.

Water Stress

- This term describes the relationship between water demand and available supply. A country faces "extreme water stress" when it uses at least 80 per cent of its available supply.
- According to the World Resources Institute (WRI), by 2050, it is projected that 100 per cent of the MENA population will live under these conditions, highlighting a critical imbalance between consumption and renewable resources.

Water Scarcity

- This refers to the chronic condition of insufficient water resources to meet the demands of a region.
- International Water Management Institute (IWMI) identified that the MENA region is the most water-scarce in the world, possessing only 1 per cent of the globe's freshwater resources. This scarcity is a fundamental feature of its natural, arid environment.

Water Security

- Achieving water security involves ensuring a reliable and sufficient quantity and quality of water for health, livelihoods, and production.
- In the MENA context, it is deeply intertwined with political stability and requires robust domestic policies, such as efficient water use and desalination, as well as multilateral cooperation on shared resources.

Water Management

- As defined by the UN's Economic and Social Commission for Western Asia (ESCWA), water management refers to the planned development, distribution, and use of water resources to achieve predetermined objectives. It encompasses all human interventions in the water cycle, from large-scale infrastructure projects to local conservation efforts.

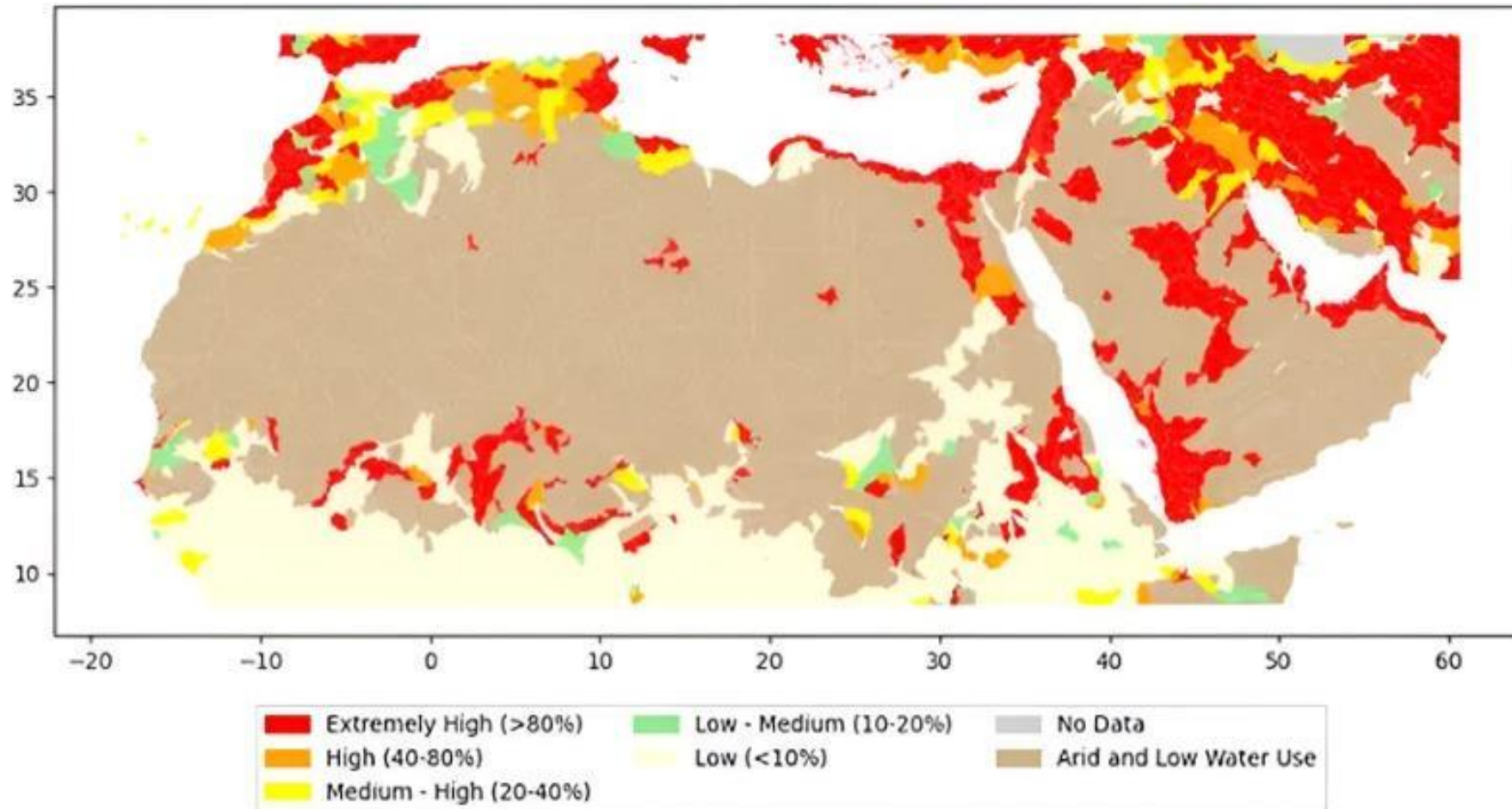
Water Infrastructure

- This is the physical network used to transmit, store, and treat water, connecting sources to end-users. It includes dams, pipelines, desalination plants, and wastewater treatment facilities, forming the backbone of any water management system.

Understanding Water Stress across MENA

MENA's water landscape begins with a stark fact: the region holds only about 1 per cent of the world's renewable freshwater resources while supporting nearly XXX per cent of humanity. Northern Africa now records a water stress level of XXX per cent, meaning withdrawals exceed renewable supply outright. Western Asia sits at XXX per cent. Both figures sit far above the global average of XXX per cent.

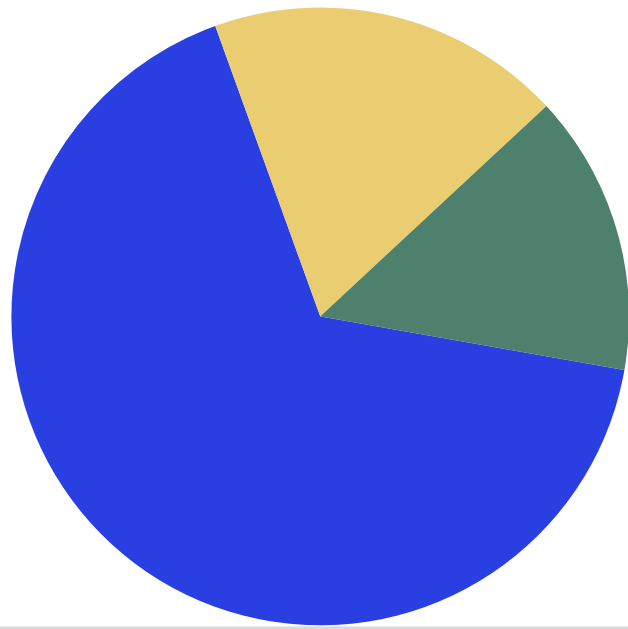
Ratio of total water demand to available renewable supply (%), 2025



Across MENA as a whole, agriculture still dominates water use, consistent with the region's reliance on irrigation in a low-rainfall climate. Industry and municipal use take smaller, though fast-growing, shares as economies diversify and cities expand.

Narrow the lens to the GCC and the picture shifts. Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE have moved from an agrarian water profile toward one driven overwhelmingly by urban and industrial consumption

MENA Water Withdrawal by Sector, % (FAO Baseline)



Commentary

- Average per-capita water use across the GCC runs at around XXX litres a day, roughly three times the global average of XXX litres.
- The GCC's population has grown from 26.2 million in 1995 to around 64.8 million in 2026 and is projected to approach XXX million by 2050.
- Saudi Arabia now ranks as the world's third-largest per-capita water consumer, after the United States and Canada
- Qatar and the UAE are MENA's fastest-growing water markets, expanding population XXX per cent and XXX per cent a year in 2024.
- Jordan, Saudi Arabia and the UAE are already over XXX per cent urbanised, concentrating municipal demand in coastal and capital cities..
- Agriculture still absorbs XXX per cent of MENA withdrawal on a regional average, even as urban demand grows fastest.

This combination- rapid population growth, high per-capita use and a hot, dry climate- means GCC demand is rising faster than almost anywhere else in the world. Subsidised tariffs have historically kept prices low, supporting development but also blunting incentives for conservation.

Major Flagship Projects

The GCC and wider MENA region host some of the largest water infrastructure projects on the planet, spanning desalination, storage and wastewater reuse.

Saudi Arabia leads on scale. XXX remains the world's largest desalination plant, producing close to 3 million cubic metres a day. XXX 3A and 3B, XXX, and XXX and 4 have added hundreds of thousands of cubic metres of daily capacity, largely using reverse osmosis. NEOM is being built around 100% renewable-powered desalination from the outset.

The UAE has pushed reverse osmosis to new limits. XXX, commissioned with a 70 MWp solar array, is the world's largest RO plant at XXX m³/day. XXX, due to reach full capacity in 2027, will become the largest solar-powered desalination facility anywhere.

Qatar, Kuwait and Oman are each expanding integrated water and power complexes, XXX, XXX and XXX among them, while Egypt's XXX and XXX wastewater plants, the two largest of their kind in the world, are turning treated water into a strategic agricultural resource rather than a waste stream.

Project	Country	Capacity	Technology	Status/Year
	Saudi Arabia	~3.0m m ³ /day		Operational, 2014
	Saudi Arabia	570,000 m ³ /day		Operational, 2024
	Saudi Arabia	600,000 m ³ /day		Operational
	Saudi Arabia	Phased		Under construction
	UAE	909,000 m ³ /day		Operational, 2022
	UAE	818,000 m ³ /day		Commissioning 2026–27
	UAE	550,000 m ³ /day		Operational, 2026
	Qatar	614,000 m ³ /day		Operational
	Qatar	Planned		2028
	Kuwait	~455 thousand m ³ /d (120 million gallons / day)		Under Construction
	Oman	300,000+ m ³ /day		Operational
	Egypt	5.6m m ³ /day (wastewater)		Operational, 2021

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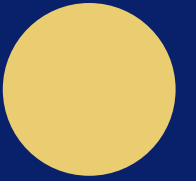
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M³= cubic metres, IWP= Independent Water Project

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Regional Overview & Projects Market



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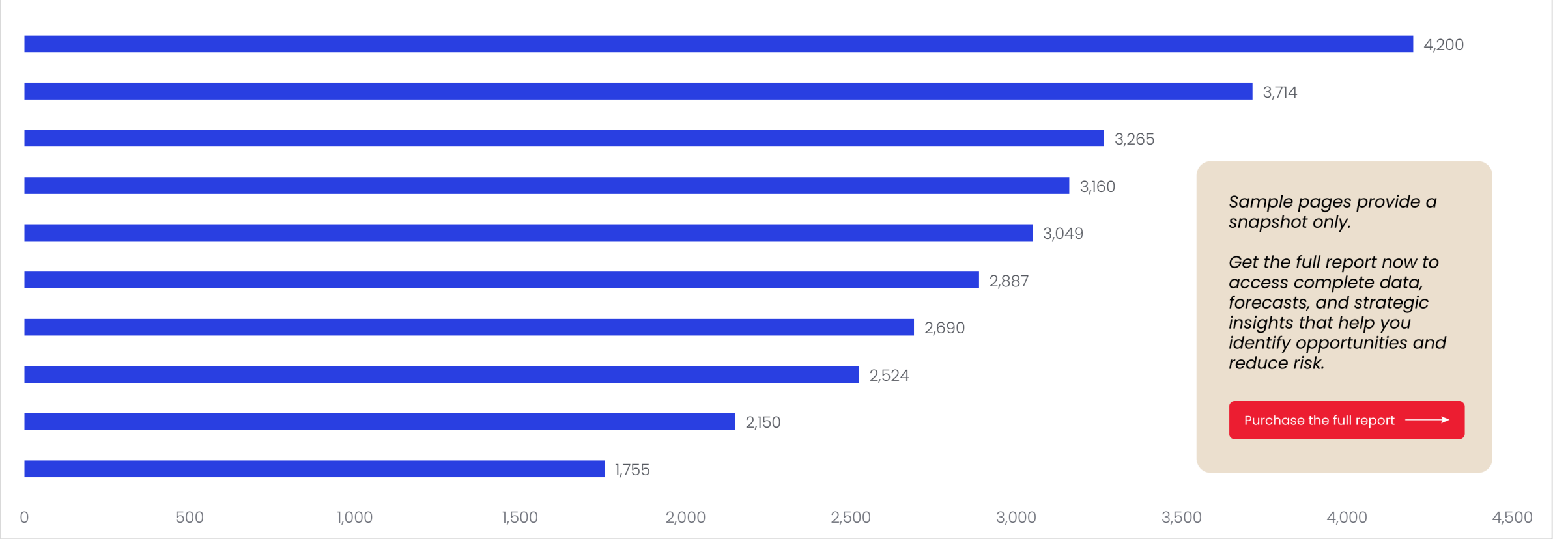
- The MENA water and wastewater market totals \$XXXbn across 2017 to 2026, which equals 3.7 per cent of the \$XXXbn tracked across all sectors.
- Projects in the build stage total \$XXXbn, or 40.5 per cent of the market.
- A larger \$XXXbn pipeline stays in design, study, or tender, so most value still needs to convert into site work.
- Other Water Sector leads the market with \$XXXbn, or 62.2 per cent of total value.
- This keeps pipelines, networks, and wider water works as the main spend area versus treatment and desalination plants.
- Contract awards jumped from \$XXXbn in 2024 to \$XXXbn in 2025, up XXX per cent, driven by larger packages.
- Awards then dropped in the seven months to 31 July 2026, down XXX per cent year on year, which signals a slower near-term flow.
- Focus on tenders and bid reviews, and plan resources for fewer, larger awards, mainly linked to Other Water Sector work.

Source: MEED Insights, MEED Projects

Top Main Contractors by Contracts in Execution (\$m)

The top main contractors by contracts in execution in the MENA water sector are led by XXX with \$4.2bn, followed by XXX at \$3.7bn and XXX with \$3.3bn. XXX ranks fourth with \$3.2bn, while XXX holds fifth place at \$3.0bn. XXX is sixth with \$2.9bn, ahead of XXX at \$2.7bn and XXX at \$2.5bn. XXX ranks ninth with \$2.2bn, and XX rounds out the top 10 with \$1.8bn.

Top Main Contractors in Water Sector in the MENA Region by Contracts in Execution (\$m)



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Source: MEED Insights, MEED Projects

Top Planned and Un-Awarded Projects in Tendering Stage

Dubai Strategic Sewerage Tunnel (DSST) Package W tops the tendering-stage pipeline at \$XXXbn, expected to be awarded in 2026, as clients push large schemes through bid evaluation. Municipal and utility owners dominate the pipeline projects of water, reflecting continued public-sector commitment to fund tendering-stage water schemes despite financing pressures elsewhere.

Top Planned and Unawarded Projects in the MENA region in the Tendering Stage				
Rank	Project	Budget (\$m)	Owner	Expected Award Year
1	Dubai Strategic Sewerage Tunnel (DSST): Package W	8,000	Dubai Municipality	2026
2		8,000		2026
3		4,367		2026
4		2,958		2027
5		1,970		2026
6		1,729		2026
7		1,633		2027
8		1,480		2027

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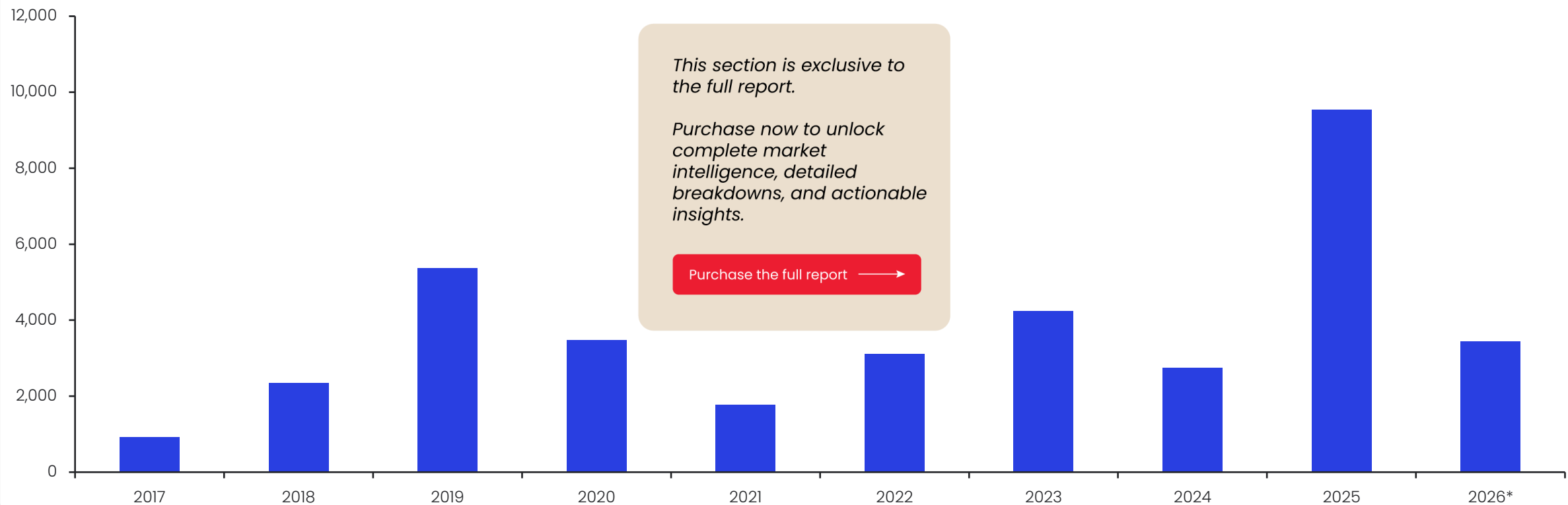
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Source: MEED Insights, MEED Projects

Water Desalination Plant: Value of Contract Awards by Year (\$m)

Water Desalination Plant contract awards hit \$XXXbn in 2025, the last full year on record. Coastal states are adding capacity as groundwater reserves fall. Awards rose from \$XXXm in 2017 to \$XXXbn in 2025. The pattern shows lumpy spending. Big schemes land in waves, not in a smooth line. In 2026 to July, awards reached about XXXbn in MENA. The 2026 run rate points to another strong year if the current pace holds. \$XXXbn in seven months is about \$XXXbn per month. The market looks set for fewer but larger award moments, so bid teams need to track single mega projects and framework batches rather than broad, steady demand.

Value of Contract Awards in Overall by Year — Water Desalination Plant (\$m)



*Data as of 31 July 2026

Source: MEED Insights, MEED Projects

Saudi Arabia Market Overview

Saudi Arabia’s demand for water is growing steadily at a rate of 7 per cent per year. This is due to a rapid expansion in the country’s economy and population since the discovery of oil nine decades ago. The population is expected to grow from XXX million to more than XXX million by 2050. The country’s water resources are scarce and under extreme pressure from the country’s growing population and urbanisation. Saudi Arabia ranks as the third-highest per capita water consumer in the world, behind only the U.S. and Canada.

Saudi Arabia is the world’s largest producer of desalinated water, with daily production capacity above 16 million m³/day in 2026, up from XXX million m³/day in 2016.

Saudi Arabia has retained its status as the world’s largest producer of desalinated water, with installed daily capacity topping XXX million cubic metres by end-2025.

The market is supported by a very large physical network, including about XXX thousand km of transmission networks and XXX thousand km of distribution networks.

Access is high for drinking water, with around 88 per cent network coverage in one official update, while sanitation coverage is lower at about 60 per cent, which leaves room for continued infrastructure growth.

The sector is also becoming more efficient and more circular. The Saudi Water Authority reports a treated-water reuse ratio of more than XXX per cent, and the country is expanding wastewater treatment and reuse as part of its long-term water security strategy.

Average per capita water consumption is XXX litres per day, showing that demand management remains an important policy priority.

Source: MEWA

Saudi Arabia water sector key facts 2026

Description Parameter	Units
Total Water Production Capacity (End of 2025)	16 million m³/day
Average Per Capita Water Consumption	
Treated Water Reuse Ratio	
Total Transmission Networks Length	
Total Distribution Networks Length	
Water Distribution	
Desalinated Water Production Capacity	
Per capita water consumer rank in the world	3
Number of Desalination Plants	

Source: World Water Council, U.S. Department of Commerce; LDP= Liters/Day/Person; m³= cubic metre

Establishment of a Modern Regulatory Body

The Saudi Water Authority (SWA), established in 2020, serves as the central oversight body for all water-related affairs in the Kingdom, responsible for developing policies, issuing licenses, and ensuring the sector aligns with global best practices.



SWA is developing the second phase of the Shuaibah SWRO desalination plant. The plant is located on the Red Sea Coast south of Jeddah. The plant is located on the south side, with the replacement of the Shoaiba-1 project located north of SWCC's Shoaiba complex.

The Plant will connect to the new potable water tank farm and the New HV Substation.

XXX was appointed as the consultant for the project.

XXX was appointed as the main contractor on the project with a contract value of \$521.2m



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Owners and Developers 

Renewable-Linked Desalination Project Status		
Project	Capacity	Status
	600,000 m3/day	
	500,000 m3/day (planned)	
	300,000 m3/day	
	n/a (existing MSF plants)	

Ras Mohaisen Independent Water Plant: XXX, in collaboration with the National Centre for Privatization (NCP), is planning to build the desalination plant, which will be in XXX, XXX, Makkah Region, 300 km south of Makkah, on the coast of the Red Sea in the Western Province.

As per the latest update, the project is in the construction stage, and full completion is expected in the last quarter of 2028.

The consortium of XXX, XXX, and XXX has been appointed as the developer for \$693m, and the client has also signed a 25-year Water Purchase Agreement (WPA) with XXX for the project.

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UAE Water Security Strategy 2036: Vision and Objectives

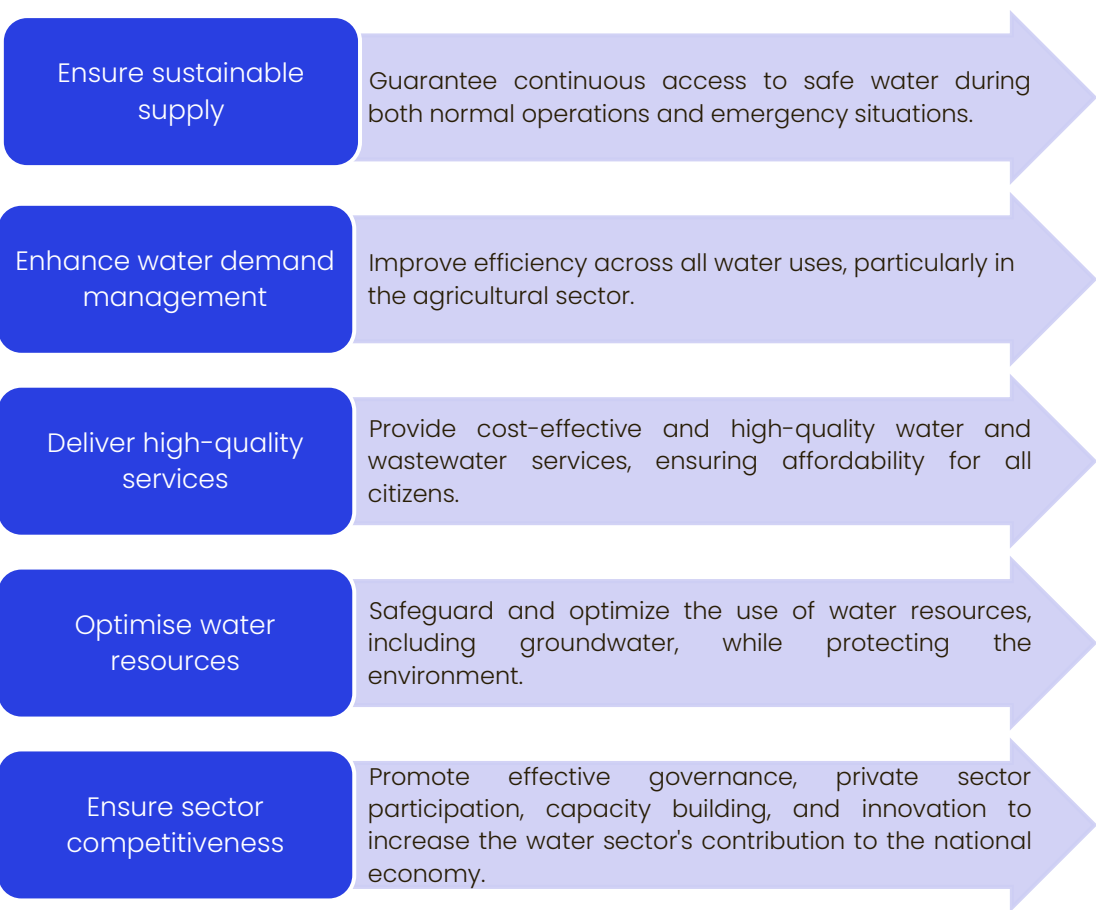
The UAE Water Security Strategy 2036, launched by the Ministry of Energy and Infrastructure in September 2017, provides a national framework for ensuring sustainable and reliable access to water. The strategy covers the entire water supply chain and is designed to maintain adequate water availability under both normal operating conditions and large-scale emergencies.

Key Objectives under the Strategy

- Reduce total water demand by 21% through improved efficiency and demand-side management across major consuming sectors.
- Reduce average per-capita water consumption by 50%, encouraging more efficient use of water by households and other consumers.
- Increase the water productivity index to US\$110/m³, improving the economic value generated from each cubic metre of water used.
- **Strategic storage:** Build reserves covering 2 days under normal conditions, 16 days in emergencies, and 45-plus days in extreme emergencies.
- **Emergency provision:** Guarantee 91 litres per person per day in emergencies, falling to 30 litres per person per day in extreme emergencies.

The central vision of the strategy is to ensure sustainable and continuous access to safe and adequate quantities of potable water under normal conditions and during emergencies. The strategy seeks to reduce the UAE’s exposure to water scarcity by combining demand management, diversified water supplies, greater wastewater reuse, strategic storage, and stronger interconnection of water networks.

Targets of the Water Security Strategy 2036



Adh Dhahirah Governorate Water Distribution Network

Quick Key Facts

Project owner	
Estimated Project Value(\$m)	\$XXXm
Award Year	August 2024
Expected Completion Year	June 2028

Scope

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Overview

Nama Water Services is undertaking the construction of water distribution networks in...

The project will be implemented in two packages; package 1 is related to water supply complexes of part of Ibri Wilayat, and package 2 is related to water supply complexes of the remaining part of Ibri, Yanqul, and Dank Wilayats.

The first package, valued at \$XXXm, has been awarded to XXX, covering major transmission lines and part of the Ibri complexes, with a completion timeline slated up to June 2028.

The second package, valued at \$XXXm, has been awarded to XXX, covering the construction of a new transmission system with new pipelines and new pump stations, new strategic storage ground reservoirs, elevated reservoirs to feed the distribution network, a distribution network to supply all the existing houses, valve chambers, thrust blocks, manholes, and associated facilities. The second package is slated to be completed by June 2028.

Stakeholders

Owner



Main Contractor

Current Status

Nama Water Services – Overview and Key Facts

Nama Water Services, legally known as Oman Water and Wastewater Services Company S.A.O.C., is an Omani closed joint-stock company responsible for water distribution and wastewater services across Oman, excluding Dhofar Governorate. The company operates as a subsidiary of Electricity Holding Company S.A.O.C. (Nama Group).

It was originally established on 21 June 2003 as Oman Wastewater Services Company and was granted wastewater concession rights by the government in 2005. Following the restructuring of Oman’s water and wastewater sector under Royal Decree 131/2020, its mandate was expanded to cover water distribution and wastewater services across the country, excluding Dhofar.

The company adopted the Nama Water Services trade name in May 2021. The company manages the development, operation and maintenance of water distribution and wastewater infrastructure, including water networks, wastewater collection systems, treatment plants and treated wastewater distribution networks. Its activities cover water supply, wastewater treatment, sewerage services, treated effluent reuse and associated customer services.

As of 2025, Nama Water Services served XXX registered water and wastewater accounts, comprising XXX water accounts and XXX wastewater accounts. During the year, the company produced XXX million cubic metres of potable water, received XXX million cubic metres of wastewater at its treatment facilities and recorded 53 per cent utilisation of treated wastewater.

Company Website	
Company Type	Government
Founding Year	2003
Head Office Address	
Contact Details	Tel:

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Key Contacts

Contact Person	Company	Job Title	LinkedIn
	Electricity and Water Authority (EWA)	Mechanical Engineer	
<i>This content is reserved for full report access.</i> <i>Unlock it now to gain complete visibility into market trends, opportunities, and risks.</i> Purchase the full report 	Electricity and Water Authority (EWA)	Outsourcing Project Manager- Water Emergency Complaints	
	Electricity and Water Authority (EWA)	Senior Civil Engineer	
	Electricity and Water Authority (EWA)	Head, Organization Development	
	Electricity and Water Authority (EWA)	General Engineer	



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