

GCC Waste Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The GCC Waste Management Market size is estimated at USD 63.56 billion in 2024, and is expected to reach USD 90.78 billion by 2029, growing at a CAGR of 7.38% during the forecast period (2024-2029).

Key Highlights

The Gulf Cooperation Council region has witnessed rapid population and urbanization growth coupled with a substantial increase in the standards of living in the past decade. This led to increased waste generation and required effective practices to tackle the waste in an eco-friendly manner. Waste to Energy is the latest trend being followed in almost all of the Gulf Cooperation Council countries. Especially in the United Arab Emirates, specialized recycling centers and solid waste conversion plants have been set up in the past to address waste management issues.

Currently, the GCC generates between 105 and 130 million tonnes of waste per annum, primarily from municipal solid waste, construction and demolition waste, and agricultural waste. Saudi Arabia and the UAE account for nearly 75 percent of all these wastes. By 2032, the Saudi government is aiming to generate about half of its energy requirements (about 72 GW) from renewable sources such as solar, nuclear, wind, geothermal, and waste-to-energy systems.

Electronic waste (e-waste) management is currently a priority, especially in economically developing nations, because improper waste disposal leads to economic loss and negative impacts on the environment and public health. E-waste generation in this region is rapidly expanding because of improving standards of living, urban growth,

access to technological improvements, changing customer preferences, and many other factors.

The Kingdom of Saudi Arabia produces around 15 million tons of municipal solid waste (MSW) each year, with an average daily rate of 1.4 kg per person. With the current growing population (3.4% yearly rate), urbanization (1.5% yearly rate), and economic development, the generation rate of MSW will double (30 million tons per year) by 2033. The major ingredients of Saudi Arabian MSW are food waste (40-51 %), paper (12-28 %), cardboard (7 %), plastics (5-17 %), glass (3-5 %), wood (2-8 %), textile (2-6 %), metals (2-8 %), etc. depending on the population density and urban activities of that area. In Saudi Arabia, MSW is collected and sent to landfills or dumpsites after partial segregation and recycling. The major portion of collected waste ends up in landfills untreated. The landfill requirement is very high, about 28 million m³ per year.

The Gulf Cooperation Council (GCC) countries will have to invest between USD 60 billion and USD 85 billion across four value streams plastic, concrete and cement, metal, and bio-waste - over the next two decades to achieve regional waste management targets, Boston Consulting Group (BCG) and World Business Council for Sustainable Development (WBCSD) said in a new report on October 2022. The investments will cover design, collection, sorting, and recycling investment across these four key waste streams.

GCC Waste Management Market Trends

Increasing E-waste Generation in Gulf Cooperation Council Region

E-waste needs to be effectively treated in GCC as there is minimal or zero legislation on e-waste, with slight differences within the counties. Kuwait, being one of the biggest per capita producers of e-waste, uses the same landfills for both conventional and e-waste. Bahrain operates only one landfill for the entire country.

Yet, several recycling initiatives are in place aimed at separating plastics, metals, and paper. However, there has yet to be a comprehensive law on e-waste management in the GCC region. Saudi Arabia contains the biggest total amount of e-waste among the GCC countries. Private companies, initiatives, and non-profit organizations are currently working on e-waste recycling, but a properly regulated system needs to be in place.

Oman, on the other hand, does not have regulations or facilities to deal with e-waste, but the country has recently stated the realization of a need for it. Qatar has also

recognized the need to address the waste management issue, but concrete actions have yet to be taken recently. In recent days, the most advanced momentum regarding e-waste of all GCC countries can be found in the UAE. In some waste management centers, there are facilities where e-waste is classified and sorted out specifically. The UAE government is presently developing regulations and facilities for sound e-waste recycling. Meshary Al-Qweizani, director general of Sector Development for the National Center for Waste Management (MWAN), on February 2023, said that 82% of all types of waste dumps would be excluded in Saudi Arabia by 2035.

As seen in many GCC countries, the need for e-waste legislation is widely recognized. E-waste management provides an opportunity and a huge potential in the entire Middle East, primarily due to a few reasons. First, e-waste management is a source of employment for both highly skilled and unskilled workers. This could help to transfer employment from the public to the private sector, which is a goal of many Gulf countries. Second, e-waste recycling can also minimize costs, as less landfill space is being used. In Bahrain, the only existing landfill is expected to reach its capacity in the next years and poses furthermore health risks for the population as it is close to urban areas.

Qatar to Attain the Fastest Market Growth

The surging quantity of liquid waste and illegitimate discarding of hazardous waste in water bodies impacted aquatic life. It augmented the eutrophication of water bodies, resulting in water-body poisoning and making it undrinkable. Hence, the need for waste management services over the study period is expected to increase in the Gulf Cooperation Council regions.

The GCC waste management market is growing exponentially across the region. However, Qatar is more likely to attain the fastest market growth in the forecast period. The country is actively focusing on waste management to protect the environment with the help of government policies, funding, and regulations to reduce the production of waste coming from numerous commercial sites, industries, and households.

Moreover, Qatar is looking forward to new ways to reduce and recycle this waste by paying attention to waste management and treatment. Besides the general domestic waste generated in the country, one of the significant waste-generating industries in Qatar is the construction industry. Therefore, government & domestic municipalities are

taking steps for the current waste generation rate to combat the massive waste production in Qatar.

GCC Waste Management Industry Overview

The Gulf Cooperation Council waste management market is moderately fragmented and highly competitive with many players present in the market. There are many players in the market involved in recovering, recycling, and exporting waste. In the entire region, UAE stands out as having few organized players that manage waste in an environmentally friendly manner. Saudi Arabia is the next big market, following UAE in the region, while Kuwait and Bahrain are catching up with newer technology companies to deal with their waste efficiently. Some of the major players in the market are Averda, EnviroServe, Blue LLC, and Envac.

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