

Saudi Arabia Construction Workforce Report 2026, NEOM, Vision 2030 & 2034 World Cup Manpower Demand

Definitive snapshot of Saudi Arabia's construction workforce as the Kingdom enters peak Vision 2030 build-out. Covers active project pipeline by giga-project, current expat headcount by trade, salary benchmarks across twenty trade categories, the impact of Saudization (Nitaqat) on private-sector hiring, GAMCA medical bottlenecks, the 2034 World Cup stadium pipeline, and 2027-2030 manpower demand forecasts. Built from GASTAT labour force surveys, Musaned visa data, MISA contractor registrations, and Mahad Manpower's Saudi-only placement audit covering 1,840 deployments across 47 employer accounts.

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3.4M

Estimated construction-sector workforce in Saudi Arabia at end-2025, the largest single-country construction labour pool in the GCC, projected to peak at 4.1M by 2029.

Key Statistics

- \$1.25T** Total announced Saudi giga-project value (cumulative, 2016-2030)
Source: MEED Projects
- 870K** Estimated active construction workforce on giga-projects alone (NEOM, Qiddiya, Diriyah, Red Sea, ROSHN, etc.)
Source: MISA contractor returns
- 244K** Indian workers deployed to Saudi Arabia in 2025, corridor's highest single-year volume since 2014
Source: eMigrate / MEA
- 11** Stadiums under construction or major renovation for the 2034 FIFA World Cup
Source: Saudi 2034 Bid Book
- SAR 2,400** Median monthly basic wage for a skilled trade worker on a Saudi giga-project (2025)
Source: GASTAT Wage Bulletin Q4 2025
- 34%** Year-on-year growth in skilled-trade visa issuances under the Musaned platform (2024 vs 2025)
Source: Musaned platform data
- 7.2%** Construction sector contribution to Saudi GDP (2025), highest in 15 years
Source: GASTAT National Accounts
- 38 days** Average end-to-end Indian-to-Saudi deployment time (2025)
Source: Mahad Manpower placement audit (n=1,840)

Vision 2030 at the Inflection Point

Saudi Arabia entered 2026 with the largest concurrent construction programme any single country has attempted in modern history. The cumulative announced value of giga-projects under the Vision 2030 umbrella has crossed USD 1.25 trillion, with active capital deployment running at an estimated USD

110-135 billion annually through 2028. The construction sector's contribution to GDP has climbed from 4.8% in 2018 to 7.2% in 2025, the highest reading since the pre-2014 oil boom. Crucially, this is no longer a "hydrocarbon-funded splurge" narrative. The PIF's asset base, the National Industrial Strategy, and the partial Aramco IPO have given Vision 2030 a structurally diversified funding mix that decouples short-term capex from oil-price volatility better than any previous Saudi expansion. For the manpower corridor, this means demand visibility is unprecedented: contractors holding active LOAs for NEOM Phase 1, Qiddiya Phase 2, Diriyah Gate, the Red Sea Project second-phase resorts, and the 2034 World Cup stadium build-out have committed manpower runways stretching through 2029.

Workforce Composition: Who Is Building Saudi Arabia

GASTAT's 2025 Q4 Labour Force Survey records a total construction workforce of approximately 3.4 million in Saudi Arabia, of which 92% are non-Saudi expatriates. By nationality, the breakdown is: Indians (28%), Bangladeshis (18%), Pakistanis (16%), Nepalis (9%), Egyptians (8%), Filipinos (4%), Sudanese (4%), other Arab nationals (8%), and other nationalities (5%). Indian workers dominate the skilled-trade segment in particular, within the 6G-certified welder, HVAC technician, and electrician categories, Indians constitute over 40% of the workforce. Saudis themselves are concentrated in supervisory, project management, and safety officer roles where Saudization (Nitaqat) quotas are most strictly enforced. The female workforce remains under 1.5% of total construction headcount, but is rising fastest in administrative, design, and quality control functions. Within the giga-project workforce of approximately 870,000, the concentration is even higher, Indian and South Asian skilled trades constitute over 70% of total deployment.

Giga-Project Headcount: Where the Demand Is Concentrated

NEOM remains the largest single workforce concentration at approximately 245,000 active workers across THE LINE construction, Trojena ski resort, Sindalah island, Oxagon industrial city, and supporting infrastructure. ROSHN, the PIF residential master-developer building 400,000+ housing units, runs second at 142,000 workers across its eight active community sites. Diriyah Gate accounts for 110,000 workers, including the heritage restoration zones and the wider mixed-use development. Qiddiya, the entertainment giga-project south of Riyadh, currently runs at 95,000 workers, with peak headcount projected at 145,000 in mid-2027 as Phase 2 attractions enter fit-out. The Red Sea Project employs 78,000 workers across the resort archipelago and Amaala. AIUla heritage and tourism development absorbs 64,000. King Salman Park (Riyadh's 16-square-kilometre central park) employs 56,000. The remaining "Visible Project Movement" (VPM) projects, Sports Boulevard, Green Riyadh, the Murabba downtown district, and miscellaneous infrastructure, collectively absorb roughly 80,000.

Salary Benchmarks by Trade

Across our 1,840-record Saudi placement audit, basic wages (SAR/month) for skilled trades cluster as follows: 6G-certified welder at SAR 4,200 (USD 1,120) basic, fully-loaded SAR 6,000; HVAC technician at SAR 3,000 (USD 800) basic, fully-loaded SAR 4,000; certified electrician at SAR 2,600, fully-loaded SAR 3,500; certified plumber at SAR 2,400, fully-loaded SAR 3,250; steel-fixer at SAR 2,200, fully-loaded SAR 3,100; mason at SAR 2,000, fully-loaded SAR 2,850. Helper / unskilled labour now sits at SAR 1,500 basic, a level the labour ministry has effectively floor-priced through Wage Protection System enforcement. The wage growth pattern is striking: skilled trades have seen 8-13% YoY basic-wage increases through 2024-2025, while unskilled labour has grown just 4%. This reflects the Kingdom's deliberate policy of upgrading inflows toward higher-productivity workers, and contractors'

practical reality of paying above the floor to attract certified hires.

Saudization (Nitaqat) Impact on Hiring

The Nitaqat localisation framework, refreshed in 2024 with tighter quotas, divides private-sector firms into Platinum, Green, Yellow, and Red bands based on the share of Saudi nationals on payroll. Construction sector firms with over 500 employees must now maintain 24% Saudization to qualify for new visa quotas under the Green band threshold. In practice, this has shaped expatriate hiring in three ways. First, contractors prefer high-skilled, high-output expat hires whose productivity justifies the higher block visa cost, pushing demand toward certified skilled trades. Second, Saudization quotas are met largely in white-collar, supervisory, and HSE functions, leaving the bulk of skilled and unskilled trade headcount fully open to expatriate recruitment. Third, contractors with poor Saudization compliance face visa freezes that interrupt project schedules, a risk that has made labour suppliers offering compliant workforce planning (with Saudization-aware ratios baked into the package) increasingly valuable. Mahad Manpower's placement audit shows 94% of our 1,840 Saudi deployments went to clients in Green or Platinum Nitaqat bands.

GAMCA Medical: The Pre-Deployment Bottleneck

The single most consistent operational bottleneck in Saudi-bound deployment is GAMCA (GCC Approved Medical Centres Association) medical clearance. All blue-collar workers must clear a GAMCA-approved medical exam in their home country before visa issuance. Across our 1,840-record audit, GAMCA-related delays accounted for 41% of total cycle-time variance, the largest single contributor. Median time from application to GAMCA fit certificate was 6 days, but the 90th-percentile case extended to 14 days due to retest requirements (typically for borderline blood pressure, hepatitis screening, or chest X-ray findings). Failed GAMCA medicals run at approximately 8% of first-attempt candidates in our dataset, with the most common rejection reasons being hypertension, hepatitis-B carrier status, and pulmonary tuberculosis history. Successful re-clearance after initial failure is possible in roughly 35% of cases (typically hypertension cases that respond to medication and a 30-day re-test window). The remaining 65% of failed medicals require candidate substitution, a meaningful pipeline disruption that operators must plan for with 10-12% candidate over-recruitment buffers.

The 2034 World Cup Pipeline

Saudi Arabia's hosting of the 2034 FIFA World Cup will require the construction or major renovation of eleven stadiums across five host cities (Riyadh, Jeddah, AlKhobar, Abha, and NEOM). Beyond stadiums, the supporting infrastructure programme covers fan zones, training grounds, hotel inventory expansion (an estimated 230,000 additional hotel rooms across the host cities), Riyadh's new metro extensions, and the King Salman International Airport mega-expansion. Cumulative direct construction value attributable to the World Cup is estimated at USD 110-135 billion, with peak workforce demand projected for late 2028 through mid-2031. Trade demand will be heaviest in stadium-specific specialties: structural steel (steel-fixer + 6G welder), MEP fit-out (HVAC tech, electrician, plumber), tensile roofing systems, turf and playing surface preparation, and broadcast/media infrastructure. Mahad Manpower's internal forecast estimates an incremental 180,000-240,000 workers above baseline manpower demand will be required to deliver the 2034 programme on schedule, on top of the existing Vision 2030 pipeline.

NEOM Phase-1 Reality Check

NEOM's public pronouncements have moderated through 2025, with revised THE LINE Phase-1

delivery targets now centring on 2030-2032 (initial 2030 commitments having quietly shifted on a 2.4-kilometre Stage-1 module rather than the originally announced 5-kilometre stretch). For manpower planning, this is meaningful: it implies NEOM workforce ramps will be more gradual but more sustained than the original aggressive curve suggested. Active NEOM headcount of 245,000 in 2025 is forecast to peak at 320,000-360,000 in 2028-2029 (against earlier 500K+ forecasts) and remain above 250,000 through 2032. Trojena, hosting the 2029 Asian Winter Games, runs the most aggressive ramp, workforce there has tripled in 18 months and is on schedule for 2027 substantial completion. Sindalah island has reached operational handover. Oxagon industrial city continues steady, less-spectacular construction. The shift to a more measured NEOM ramp reduces near-term hiring shocks, but extends the demand horizon, a net positive for sustained labour-corridor planning.

Implications for Manpower Planners

For contractors, EPCs, and HR planners working Saudi mobilisation through 2027-2028, four operational priorities emerge from this dataset. First, lock in skilled-trade pricing through medium-term framework agreements rather than spot-market hiring, wage inflation in the 8-13% YoY range is structural, and contractors who delayed 2024 framework signings paid materially more in 2025. Second, build GAMCA buffer capacity into mobilisation timelines. Plan for a 38-day median cycle but budget the 90th-percentile case at 56 days, and over-recruit candidates by 10-12% to absorb medical failures without schedule slippage. Third, prioritise NSDC-certified and trade-tested intake. Certification raises wages by 8-12% but raises 18-month retention by 16% and lowers safety-incident rates by 23%, a net positive on cost per productive man-hour. Fourth, diversify source-state intake within India to reduce monsoon-cycle and harvest-cycle dispatch risk; a 60/30/10 mix of UP-Bihar / TN-Kerala-Rajasthan / Other materially smooths quarterly mobilisation curves.

Forecast 2027-2030

Base-case forecast (60% probability): Saudi construction workforce peaks at 4.1 million in 2029, driven by simultaneous peaks in Vision 2030 giga-project Phase-2 deliveries and the 2034 World Cup stadium build-out. Indian deployment to Saudi Arabia averages 280K-310K annually 2026-2030, totalling roughly 1.4M cumulative inflow. Bull case (20% probability): NEOM Phase-1 acceleration combined with PIF's announced industrial city expansion (Wa'ad Al Shamal Phase-3, King Salman Industrial City extension) pushes peak workforce to 4.6M and Indian deployment to 1.7M cumulative. Bear case (20% probability): an oil-price decline below USD 60/barrel through 2027 triggers giga-project rephasing, reducing peak workforce to 3.6M and Indian deployment to 1.1M cumulative. In all three scenarios, the structural composition shift toward skilled trades continues, by 2029 we forecast 68-73% of Saudi expatriate construction workforce will hold formal trade certification, against 51% in 2025.

"Saudi Arabia is no longer a normal labour market. The country is running the largest concurrent construction programme in modern history while simultaneously tightening localisation and certification rules. For Indian recruitment partners, the implication is unambiguous: certified, productive, project-ready workers will command structural wage premiums for at least the next four years. Contractors who treat manpower as a commodity will lose schedules to the contractors who treat it as a strategic input. The 2034 World Cup pipeline alone will absorb roughly two hundred thousand additional skilled trade workers above baseline."

Obaidur Rahman, Mahad Manpower

Saudi Construction Salary Benchmark by Trade (2025, SAR/month)

Trade	Basic Wage	OT + Allowanc...	Fully-Loaded	YoY Delta
6G Welder	4,200	1,800	6,000	+12%
HVAC Technici...	3,000	1,000	4,000	+11%
Electrician (...)	2,600	900	3,500	+9%
Plumber (cert...)	2,400	850	3,250	+8%
Steel-Fixer	2,200	900	3,100	+13%
Mason	2,000	850	2,850	+10%
Carpenter (sh...)	2,100	850	2,950	+9%
Scaffolder	2,300	950	3,250	+8%
Painter	1,900	700	2,600	+6%
Tile Fixer	2,000	750	2,750	+7%
Driver (heavy)	2,400	700	3,100	+8%
Helper / unsk...	1,500	500	2,000	+4%

Wages are 2025 medians from Mahad Manpower's Saudi placement audit (n=1,840). Fully-loaded values include overtime, food, accommodation, transport, and prorated end-of-service.

Frequently Asked Questions

Q. How large is Saudi Arabia's construction workforce in 2026?

A. GASTAT's 2025 Q4 Labour Force Survey records approximately 3.4 million workers in the Saudi construction sector, of which 92% are non-Saudi expatriates. The workforce is forecast to peak at approximately 4.1 million in 2029 driven by Vision 2030 giga-project Phase-2 deliveries and 2034 World Cup stadium construction.

Q. How many workers are employed on Saudi giga-projects?

A. Approximately 870,000 workers are deployed across the active giga-project portfolio (NEOM, Qiddiya, Diriyah, Red Sea, ROSHN, AIUla, King Salman Park, and other VPM projects) as of end-2025. NEOM alone employs roughly 245,000.

Q. What is the average wage for a skilled construction worker in Saudi Arabia?

A. Median basic wages in 2025 (SAR/month): 6G welder SAR 4,200, HVAC technician SAR 3,000, certified electrician SAR 2,600, certified plumber SAR 2,400, steel-fixer SAR 2,200, mason SAR 2,000. Fully-loaded packages (including OT, food, accommodation, transport, end-of-service) run 35-55% higher than basic.

Q. How does Saudization affect hiring expat construction workers?

A. The Nitaqat framework requires construction firms over 500 employees to maintain 24% Saudization for Green-band visa quota access. In practice, Saudization is met in supervisory and white-collar functions, leaving the trade workforce fully open to expatriate hiring. Compliance failures trigger visa freezes that disrupt project schedules.

Q. How long does it take to deploy an Indian worker to Saudi Arabia?

A. Median end-to-end deployment cycle in 2025 was 38 days from candidate selection to flight. The single largest variance contributor is GAMCA medical clearance (41% of cycle-time variance), with median 6 days but 90th-percentile cases extending to 14 days due to retest requirements.

Q. What stadiums are being built for the 2034 FIFA World Cup?

A. Saudi Arabia's 2034 World Cup will use eleven stadiums across five host cities (Riyadh, Jeddah, AlKhubar, Abha, NEOM). The peak construction workforce demand for the World Cup programme alone is forecast at

an incremental 180,000-240,000 workers above baseline, peaking late 2028 through mid-2031.

Q. Which Indian states send the most workers to Saudi Arabia?

A. Uttar Pradesh and Bihar dominate the Saudi-bound corridor, accounting for roughly 52% of all Indian-to-Saudi emigration in 2025. Tamil Nadu and Rajasthan represent the second tier (combined 17%), with Telangana, West Bengal, and Kerala filling out the remaining major sources.

Q. Can these Saudi construction statistics be cited in articles?

A. Yes. This research is published under Creative Commons CC-BY 4.0. You may freely cite, quote, and embed the data in articles, blog posts, academic papers, and corporate research provided you link back to the original report at mahadmanpowers.co.in/research/.

Methodology

This report draws on four datasets. (1) GASTAT Labour Force Survey quarterly releases (2018 Q1 through 2025 Q4) for total workforce, sector breakdown, nationality composition, and wage band data. (2) MISA contractor returns and PIF subsidiary disclosures for giga-project headcount estimates, cross-checked against project-level press releases and contractor public statements. (3) Musaned platform visa issuance data and eMigrate clearance volumes for Indian-deployment flow analysis. (4) Mahad Manpower's anonymised Saudi-only placement audit (n=1,840 deployments, 2022-2025) for fully-loaded compensation breakdowns, deployment cycle times, GAMCA pass rates, and 18-month retention. Giga-project workforce numbers are estimates with +/-10-15% uncertainty bands; published official figures are scarce and what we present is triangulated from contractor returns and field reporting. Salary benchmarks are 2025 medians and may not reflect specific role/employer combinations. Forecasts are scenario-based with explicit probability weightings. Data cut-off: 28 April 2026.

Sources

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