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FROST & SULLIVAN JULY 2026

NAVIGATING TRANSFORMATION – MIDDLE EAST

A Strategic Lens on Resilience, Preparedness, and Growth

Dear Reader,

Despite ongoing regional volatility, the GCC's long-term growth narrative continues to strengthen. This month marks the start of a series of Middle East-specific analyses — on Economic Transformation, Plastic Circularity, Specialty Chemicals, and Decorative Paints - launching over the coming weeks.

Warm Regards,
Abhay Bhargava
Managing Director & Regional Head
Frost & Sullivan, Middle East & Africa

UPCOMING GROWTH OPPORTUNITY REPORTS

Four upcoming analyses. One common thread: **the opportunity window across the GCC is narrowing.**

01 | GCC ECONOMIC TRANSFORMATION

Where Will the GCC's Next Decade of Growth Come From?

USD 6 trillion in sovereign wealth capital is already in motion.

Why the oil-cycle story is giving way to a productivity-led one

Non-Oil Diversification, Applied AI, Logistics, and Renewable Energy are redrawing the GCC's competitive map through 2035 — and the window to position early is narrowing.

Frost & Sullivan Report: *Gulf Cooperation Council Economic Transformations and Opportunities, 2025–2035*

02 | PLASTIC CIRCULAR ECONOMY

Can the GCC Turn Plastic Circularity into Industrial Scale?

Scaling recycling to 40% could unlock $1Bn+ in annual value.

Why circularity is becoming an infrastructure play, not just a sustainability goal

Across Saudi Arabia, the UAE, and Oman, the circular economy agenda is moving beyond ambition and into execution. The greatest opportunities are emerging in collection networks, advanced sorting capabilities, and circular polymer platforms.

Frost & Sullivan Report: *GCC Plastic Circular Economy, 2025–2030*

03 | SPECIALTY CHEMICALS

The Next Phase of MENA's Chemical Strategy Is About Selectivity

USD 35Bn opportunity over the next 5 years.

Why selectivity, not import substitution, defines the next move in the Middle East Chemical Industry

Not every specialty chemicals segment warrants localization. The strongest opportunities lie where robust demand growth intersects with feedstock advantages and technology differentiation.

Frost & Sullivan Report: *Growth Opportunities in MENA Region Specialty Chemicals Industry, 2025–2030*

04 | KSA DECORATIVE PAINTS

In Decorative Paints, Project Visibility Matters as Much as Market Growth

A ~USD 1Bn market being reshaped by where giga-projects actually land.

Why demand visibility now matters as much as demand potential

As giga-project timelines are rationalized across the GCC, growth is becoming increasingly concentrated in housing, urban development, and priority infrastructure projects with clearer funding and execution pathways.

Frost & Sullivan Report: *Growth Opportunities for Decorative Paints in KSA Region, 2025–2030*

ALSO IN THE PIPELINE FOR AUGUST

- Growth opportunities in Chlorine Derivatives in the Middle East
- Growth opportunities in Sulphur Derivatives in the Middle East
- Growth opportunities in Plastic Packaging in the Middle East
- Recent Developments in Soil Technologies and Relevance to the Middle East

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