pwc

Industrial manufacturing's race to 2030

The next growth advantage for the Middle East will come from resilience and operational strength

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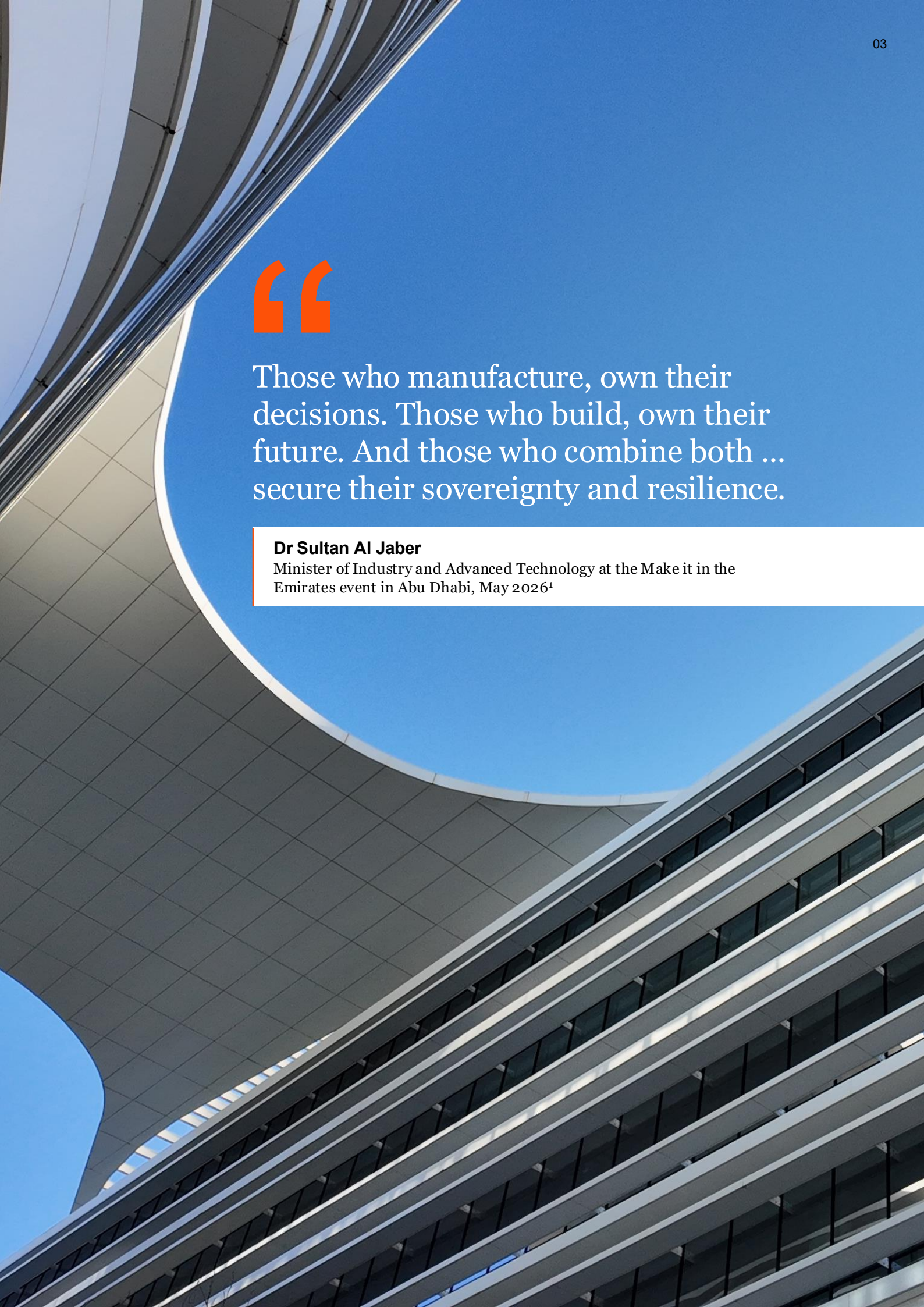


> Those who manufacture, own their decisions. Those who build, own their future. And those who combine both … secure their sovereignty and resilience.

Dr Sultan Al Jaber
Minister of Industry and Advanced Technology at the Make it in the Emirates event in Abu Dhabi, May 2026[1]

Executive summary

Industrial manufacturing is moving to the centre of the Middle East's economic strategy. Across the region, governments are seeking to build more productive, resilient and higher-value industrial systems. National agendas in Saudi Arabia, Qatar and the United Arab Emirates (UAE) point to the same ambition: to diversify their hydrocarbon-dependent economies, localise strategic supply chains and significantly grow the industrial sector's contribution to non-oil GDP. Collectively, they aim to attract foreign investment, create high-skilled jobs for nationals, boost exports and establish the GCC as a global hub for advanced and sustainable manufacturing, an agenda increasingly backed by sovereign capital accelerating the sector's transformation.

For industrial manufacturers operating in the region, this raises the bar. Growth remains firmly on the agenda, but sustaining high operational performance is becoming more demanding. Middle East findings of PwC's **Industrial Manufacturing's race to 2030** survey suggest that, over the next five years, value creation will be shaped by macroeconomic conditions, supply chain dynamics, energy costs and workforce capability. Survey respondents place a greater weight on resilience, operational capability and industrial competitiveness when setting priorities and making investment decisions.

The recent Middle East conflict has added pressure to an already challenging operating environment, reinforcing the need for manufacturers to reduce exposure to disruption and build more adaptable production networks. While the survey findings reflect sentiment before this escalation, they point to priorities that have only become more urgent. Major industrial players are using this moment to deepen local capability, strengthen supply resilience and protect strategic sectors from global volatility.

As manufacturers operating in the region widen their ecosystem, reach new customer segments and broaden their product and service offerings, they are now doing so with sharper attention to the operating foundations needed to support that growth. Technology is becoming an important part of this story – organisations are leveraging artificial intelligence (AI) to improve performance, reliability and decision-making.

In the race to 2030, the next phase of industrial growth in the Middle East will be defined by the ability to convert pressure into capability, disruption into resilience, and national industrial strategies into commercially viable manufacturing systems.

Key findings

61%

of respondents who have their operating bases in the Middle East cite operational efficiency and effectiveness as the capability most critical to future financial performance.

48%

say they are very or extremely likely to near-shore or regionalise operations over the next five years.

67%

expect engineering, procurement and construction firms to drive the most revenue growth over the next five years.

52%

expect government and public sector entities to be a major source of revenue growth.

59%

say gaps in workforce skills and capabilities will significantly inhibit their company's ability to change over the next five years.

59%

identify AI as the technology most likely to help achieve strategic goals over the next five years.

01 Supply chain pressures move to the top of the manufacturing agenda

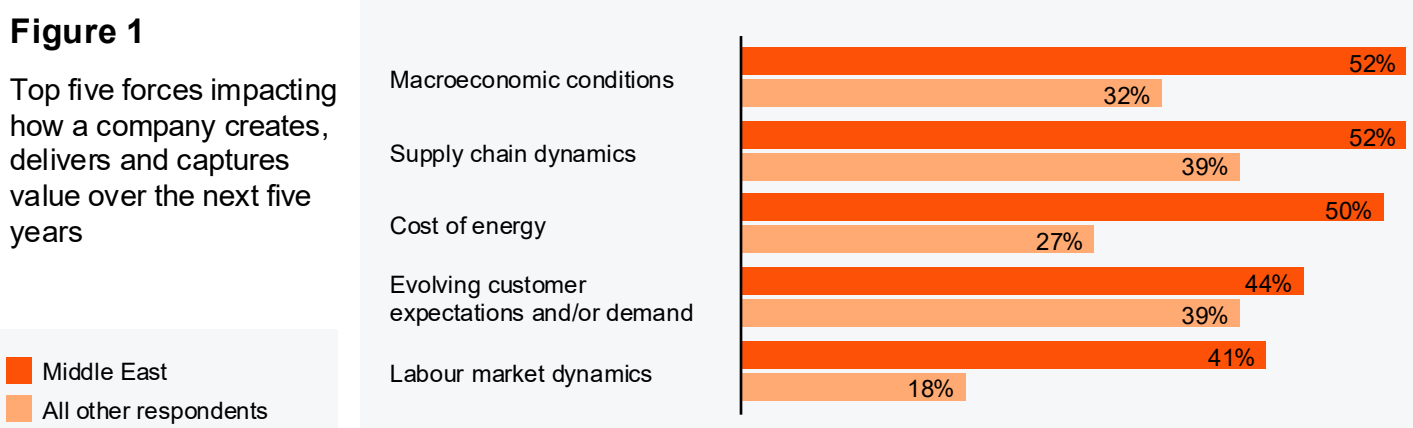
For respondents with industrial manufacturing bases in the Middle East, the outlook is shaped largely by operating pressures that are driving change across the sector.

Macroeconomic conditions and supply chain dynamics are jointly the leading forces expected to shape how companies expect to create, deliver and capture value over the next five years, each cited by 52% of respondents, followed closely by the cost of energy (50%) and evolving customer expectations (44% see Figure 1). This suggests that manufacturers operating in the region are focused on cost control and operational continuity in an uncertain geopolitical and economic environment.

The region also places much greater emphasis on labour market dynamics, cited by 41% of the respondents – 23 percentage points higher than all other global respondents. This highlights the importance of talent availability and capability in the region's industrial growth story.

Figure 1

Top five forces impacting how a company creates, delivers and captures value over the next five years



These operating pressures matter because they directly affect manufacturers' ability to scale. Macroeconomic volatility affects investment planning, pricing and demand visibility. Supply disruption affects lead times, customer service and working capital. Higher energy costs affect production economics. For manufacturers trying to grow beyond domestic markets, these are not secondary issues. They shape whether companies can scale reliably, compete on cost and support wider diversification goals.

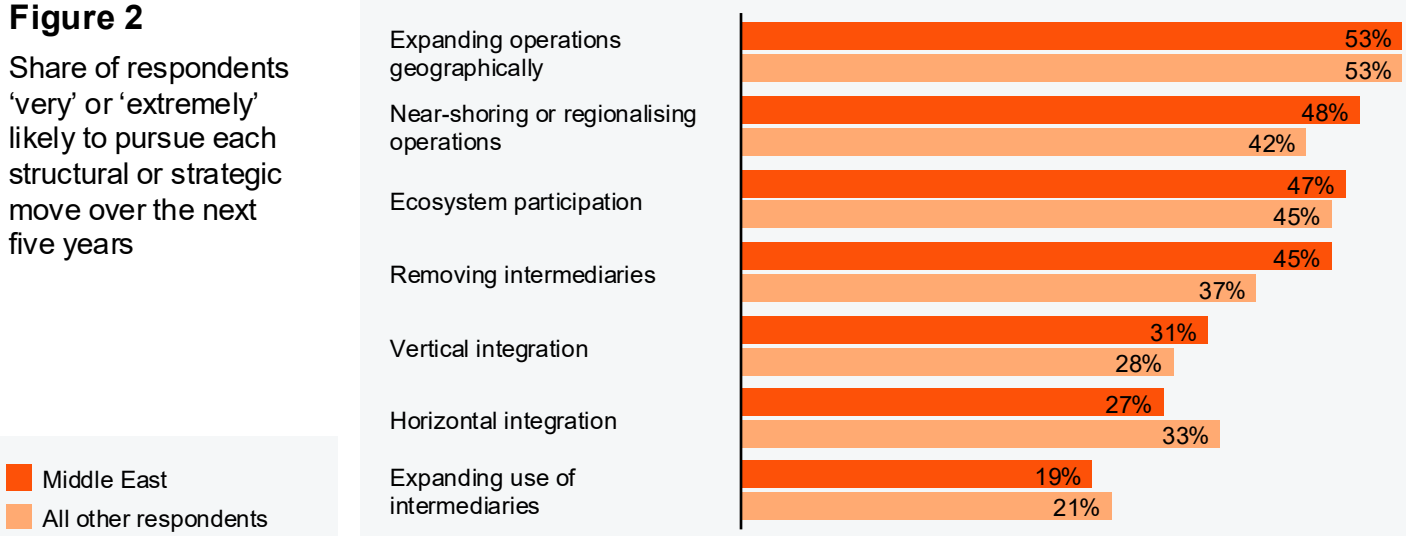
This is reflected in the region's industrial policy agenda. Across Saudi Arabia, Qatar and the UAE, industrial development is closely tied to diversification, localisation, technology transfer and job creation. Recent shocks – from the Middle East conflict to other climate-related disasters in the past and ongoing cyber threats – have exposed the vulnerabilities of global supply chains. In response, governments in the region are now using industrial policy to strengthen domestic manufacturing, localise critical products and reduce exposure to global disruption.

The UAE's Dh1 billion National Industrial Resilience Fund[2] is a clear example, designed to strengthen domestic manufacturing, secure supply chains and scale the use of AI across production, alongside a target to fully localise more than 5,000 critical products. It aims to make the National In-Country Value Programme mandatory across government entities and national companies. For manufacturers, it also creates the opportunity to rethink sourcing and supplier ecosystems, while aligning with government-backed efforts to build more secure, technology-enabled and regionally anchored value chains.

Nearly half of the respondents (48%) who have their operations in the region are more likely than all other global respondents (42%) to say they are 'very' or 'extremely' likely to near-shore or regionalise operations over the next five years while also remaining focused on geographic expansion (see Figure 2).

Figure 2

Share of respondents 'very' or 'extremely' likely to pursue each structural or strategic move over the next five years



In the context of the recent disruptions around the Strait of Hormuz, nearshoring has become a strategic lever for both governments and businesses. By relocating manufacturing and sourcing closer to home, or to markets with aligned interests and stronger trade relationships, companies can reduce exposure to geopolitical chokepoints, strengthen supply chain resilience and build more reliable regional production networks. This is not about abandoning globalisation but building options so supply chains can shift rapidly between global, regional and local configurations as conditions change. Over time, this may strengthen the case for more complementary industrial capacity across the region as it reinforces ties with strategic partners.[3]

The data also points to a desire for greater control. 45% of Middle East respondents are likely to remove intermediaries over the next five years, compared with 37% globally, while 31% are considering vertical integration, versus 28% globally. This suggests companies are looking to take greater control over supply chains, routes to market and key parts of production. At the same time, Middle East respondents are slightly more likely to pursue ecosystem participation at 47% versus 45% globally, showing that collaboration remains important, even as organisations seek greater control.

Technology deployed not in isolation

Survey findings indicate that respondents with operating bases in the Middle East are less focused than global peers on emerging technologies (25% versus 39% globally, although such technologies are already visible in major manufacturing projects across the GCC).

The UAE's defence conglomerate Edge Group, for example, uses advanced technologies to support the development of local manufacturing capability in strategic sectors, including advanced defence systems and cyber protection. Ranked among the world's top 100 defence companies, Edge's annual spend of around Dhs10bn to Dhs12bn to procure materials from the domestic market also shows how national champions can strengthen local supply chains and contribute to a broader ecosystem for advanced technology industries.[4]

02 Growth is shifting toward higher-value industrial opportunities

Manufacturers operating primarily in the Middle East are more likely than global peers to generate a significant share of sales from new products and services. 19% of respondents who have their operations in the region say that 41-60% of current sales come from products and services not sold three years ago, while a further 13% say that 61-80% comes from newer offerings. Both figures are well above the global averages of 6% and 1% respectively, suggesting that manufacturing leaders are moving faster to refresh portfolios, respond to changing demand and capture new sources of growth.

When asked which activities their company expects to generate revenue from this fiscal year and over the next five years, respondents indicated a current revenue base concentrated in traditional industrial activities, with future growth shifting toward higher-growth, transformation-led sectors.

For the current fiscal year:

67%

of respondents with an operating base in the region expect the strongest revenue sources to be manufacturing and distribution of consumer goods and industrial products.

64%

who chose construction of infrastructure, commercial facilities and housing.

However, the more interesting movement is in the emerging growth areas. 33% chose technology, digital and communications products and services for the next five years, rising from 20% who chose the same in the current fiscal year – the largest increase at +13 percentage points. Energy and fuel rise as emerging revenue sources, selected by 23% of respondents for the current fiscal year compared to 31% for the next five years, while healthcare grows from 6% to 11% and food rises from 5% to 8% (see Figure 3). This points to a gradual shift toward sectors linked to digital transformation, energy transition, health resilience and food security, aligning closely with GCC government agendas focused on tech transformation, energy transition, health security and food resilience.

Figure 3

From which of the following activities does your company plan to earn revenue during this fiscal year and over the next five years?

	This fiscal year	Over next five years	Difference
Manufacture and distribution of consumer goods and industrial products	67%	67%	0%
Construction of infrastructure, commercial facilities and housing	64%	61%	-3%
Production and distribution of energy and fuel products and services	23%	31%	+8%
Production and delivery of technology, digital and communications products/ services	20%	33%	+13%
Production and delivery of public and private mobility products and services	17%	17%	0%
Production and delivery of educational, governmental and defence products/services	14%	14%	0%
Production and delivery of financial products and services	13%	13%	0%
Production and delivery of human healthcare products and services	6%	11%	+5%
Production and distribution of food and providing food services	5%	8%	+3%

In the GCC, growth in data centres, AI-driven networks and automation is accelerating demand for advanced manufacturing capabilities. Projects such as Lucid's AMP-2 facility in King Abdullah Economic City show how this shift is translating into higher-value industrial activity. By adding electric vehicle assembly to Saudi Arabia's manufacturing base,[5] Lucid illustrates how growth is emerging in targeted, technology-enabled segments such as mobility.

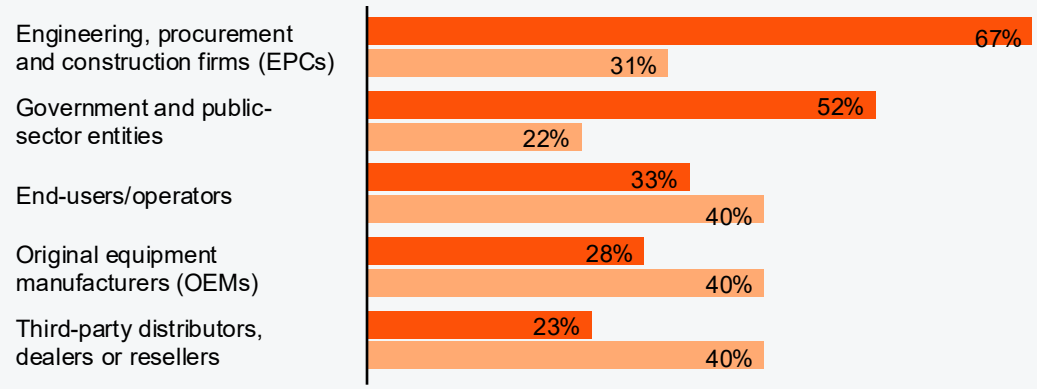
At the same time, rising demand for critical minerals linked to the energy transition is pushing Saudi Arabia, Qatar and the UAE to expand upstream capacity, downstream processing and digital innovation, building more secure and greener clean-energy value chains.[6] The region is also deepening industrial partnerships in pharmaceuticals to strengthen domestic medical manufacturing.[7] In parallel, GCC governments are also prioritising essential products that can be produced locally and scaled reliably to build more self-sufficient, scalable and resilient food production and distribution systems.[8, 9]

Customer segments expected to drive growth

According to the survey data, more than two-thirds of respondents expect the strongest revenue growth over the next five years to come from engineering, procurement and construction firms, followed by government and public-sector entities (see Figure 4). This points to a market where industrial demand remains closely tied to infrastructure, project-led activity and state-backed development programmes.

Figure 4

Top five customer segments to drive revenue growth over the next five years



Growth is also expected to come from a broader customer base. 55% of respondents who have operations in the region expect 21-40% of revenue in five years' time to come from new customers, while a further 20% expect 41-60%. This reinforces the importance of entering new markets, reaching new customer segments and aligning more closely to where demand is growing.

The search for new customers is also shaping geographic priorities. Among respondents with operating bases in the region, 58% are looking to Southeast Asia, 53% to South Asia, and 43% each to Sub-Saharan Africa and the wider Middle East and North Africa as future growth markets. This suggests that expansion is likely to be shaped by proximity, connectivity and access to adjacent high-growth markets.

The survey also shows that companies who have their operations in the region are pursuing growth through several connected moves rather than a single dominant strategy. Entering new geographic markets, expanding into new customer segments and broadening product or service offerings are each selected by 39% of regional respondents, with expanding strategic collaboration with other companies close behind at 36% (see Figure 5).

Figure 5

Top five actions to capture new growth opportunities over the next five years

03 Financial performance deepens with operational resilience

When asked about the capabilities that will be most critical to financial performance over the next five years, 61% of the respondents with operating bases in the Middle East have prioritised operational efficiency and effectiveness versus 48% of all other global respondents, indicating a focus on productivity, cost control and timely delivery. Close to a third (31%) have chosen flexible and resilient supply chains versus 25% globally, while workforce upskilling and reskilling is cited by 25% of respondents versus 13% globally (see Figure 6).

These choices reinforce the earlier findings on ‘forces’ expected to shape value creation. With regional respondents placing high importance on supply chain dynamics and labour market pressures, manufacturers are prioritising the capabilities that directly respond to these pressures such as improving productivity, strengthening resilience and building the talent base needed to scale in an uncertain environment.

For example, in the UAE, Strata – a leading advanced manufacturing entity – has shown how operational maturity, supply chain relevance and workforce localisation has resulted in its growth. Since 2010, the company has grown from one production line to 30, reflecting manufacturing scale and efficiency. The organisation now supplies major global aerospace players, deepening the UAE’s role in global aerospace supply chains. Its national workforce also highlights how advanced manufacturing can support localisation, aligning with the UAE’s broader industrial talent agenda.[10]

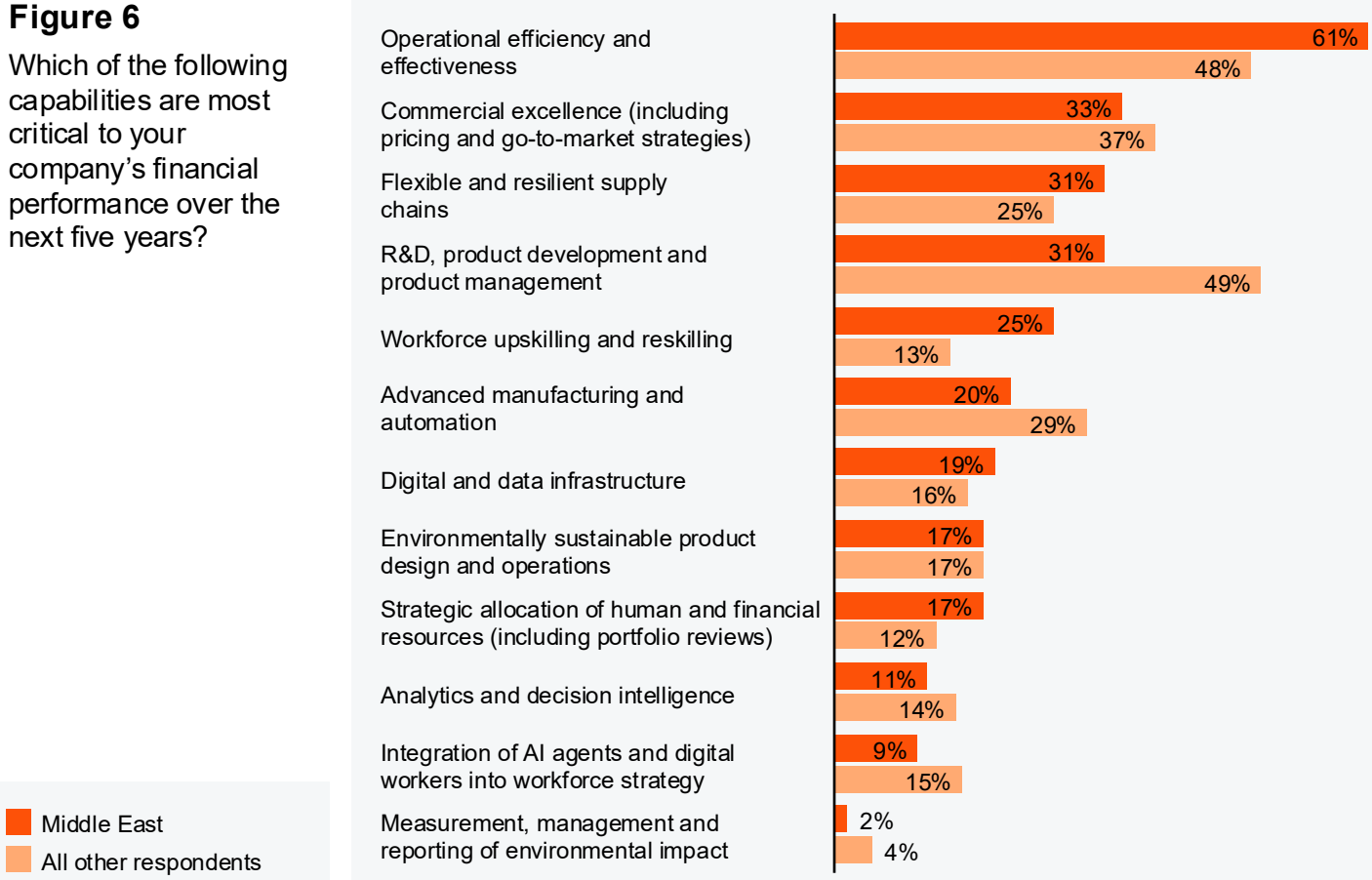
Saudi Arabia's Ceer offers a "Made in Saudi" example of advanced manufacturing being used to build local industrial capability, deepen supply chains and create higher-value jobs. Backed by the Kingdom's Public Investment Fund, Saudi Arabia's first EV brand has a US$1.3bn manufacturing complex under development in King Abdullah Economic City[11] and reflects the wider localisation agenda in Saudi Arabia as it continues to strengthen the Kingdom's position in clean mobility.

Untapped potential in R&D and automation

According to the survey data, respondents with operating bases in the Middle East place less emphasis than their global peers on research and development (R&D), product development and product management (31% versus 49% globally), and advanced manufacturing and automation (20% versus 29% globally). This suggests that, while innovation and technology remain important, Middle East manufacturers are likely more focused on closing the capability gaps that directly affect competitiveness, continuity and growth.

Figure 6

Which of the following capabilities are most critical to your company's financial performance over the next five years?

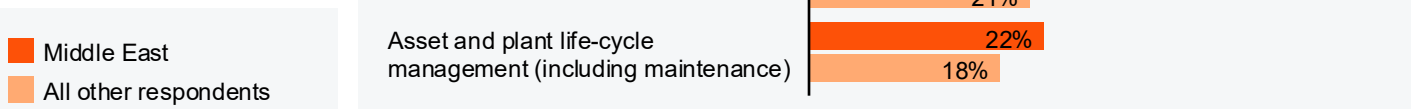


Production and quality lead the investment agenda

Production and operations also stand out as the leading investment priority, selected by 56% of respondents in the region compared with 45% globally (see Figure 7). This reinforces the region's focus on improving manufacturing performance, efficiency, capacity and reliability. Product design and development follow at 36%, 17 percentage points lower than global peers, while quality assurance is selected by 31%, more than double the 15% global average, highlighting the importance of consistency, compliance and quality-led competitiveness as manufacturers seek to integrate into more demanding regional and global value chains.

Figure 7

Top five areas of the company's value chain to see percentage increases over the next five years



This reflects the structure of manufacturing in the region. Many manufacturers operate in capital-intensive sectors such as energy, petrochemicals, metals, construction materials, mobility and infrastructure-linked production. Demand is often shaped by major projects, government programmes and state-backed entities, so companies tend to focus on efficiency, quality, reliability and supply continuity rather than frequent product redesign.

Internal capability and partnerships drive growth

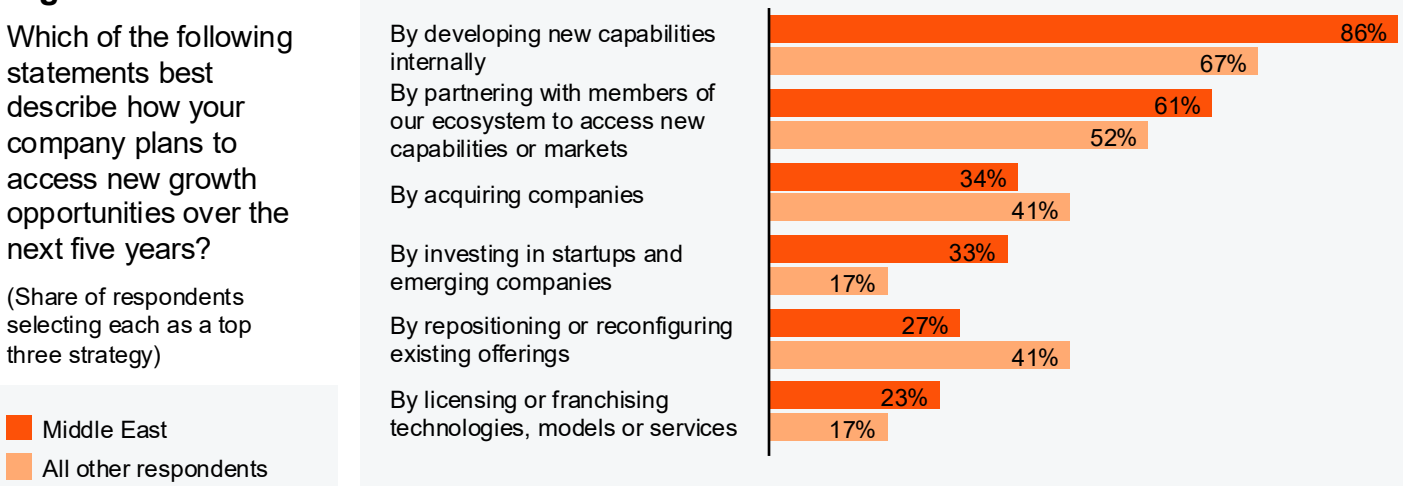
The survey also shows that growth and capability building are being pursued in parallel. A notable 86% of respondents with operating bases in the region say developing new capabilities internally is among the top three strategies to access growth opportunities, significantly higher than 67% globally. This is followed by a strong focus on partnerships to accelerate access to technology, innovation and new markets, with 61% looking to ecosystem partners to access new capabilities or markets, compared with 52% globally. Regional respondents are also more likely to invest in startups and emerging companies, at 33% versus 17% globally.

By contrast, acquisition-led growth is less prominent, selected by 34% of regional respondents versus 41% globally, while repositioning existing offerings is also lower at 27% versus 41%.

Figure 8

Which of the following statements best describe how your company plans to access new growth opportunities over the next five years?

(Share of respondents selecting each as a top three strategy)



04 AI and automation are moving from interest to application

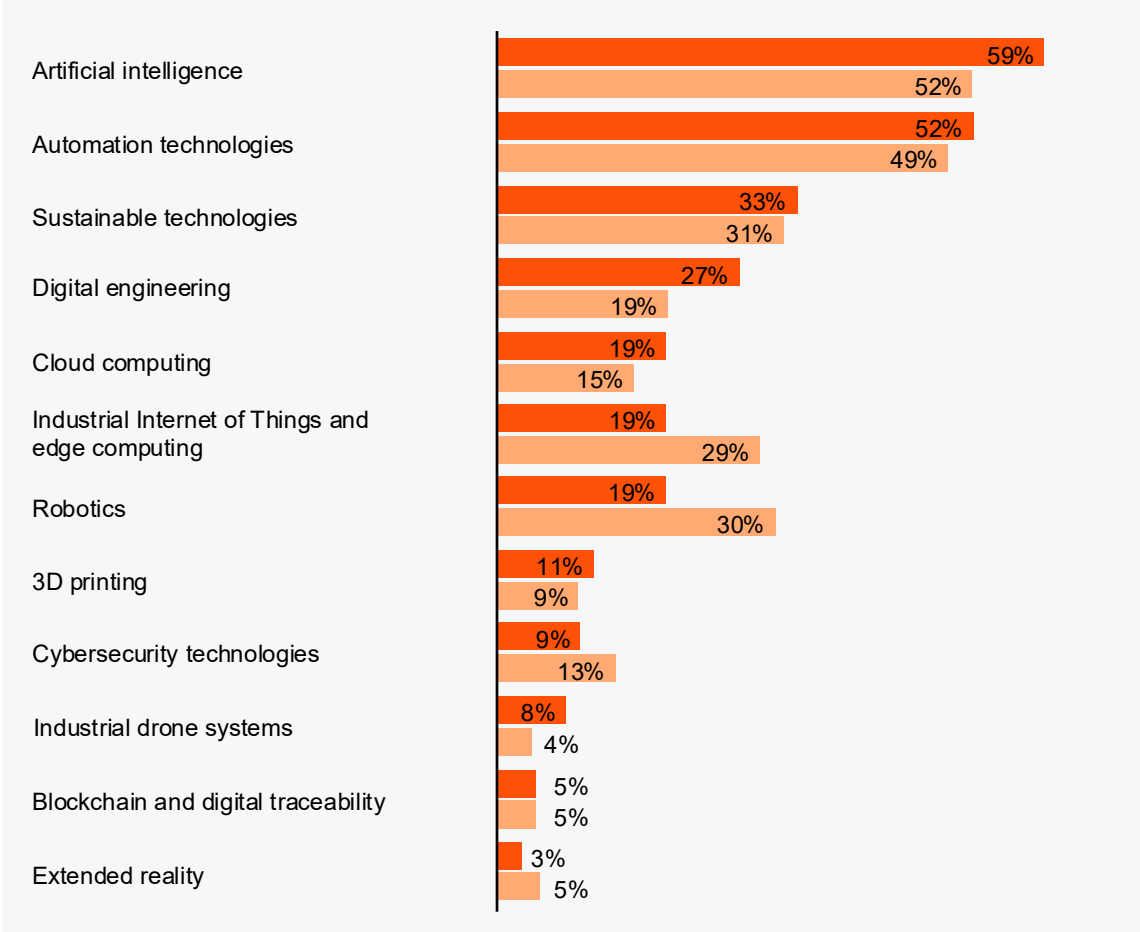
Manufacturers who have their operations in the region are prioritising technologies that can improve day-to-day performance, with AI and automation leading the agenda. AI ranks as the most important technology for achieving strategic goals over the next five years, selected by 59% of respondents, followed by automation technologies at 52% (see Figure 9).

Sustainable technologies stand at 33% and digital engineering at 27%. Compared with global peers, respondents were seen to place less emphasis on cloud computing, robotics, industrial Internet of Things and edge computing.

However, it's important to note that while AI is top of mind, only 9% of respondents identified the integration of AI agents and digital workers as an important capability over the next five years (see Figure 6 above). This suggests that organisations are approaching AI adoption with caution, focusing on targeted use cases rather than broad-based integration.

Figure 9

Which of the following technologies do you believe will play the most important role in helping your company achieve its strategic goals over the next five years?



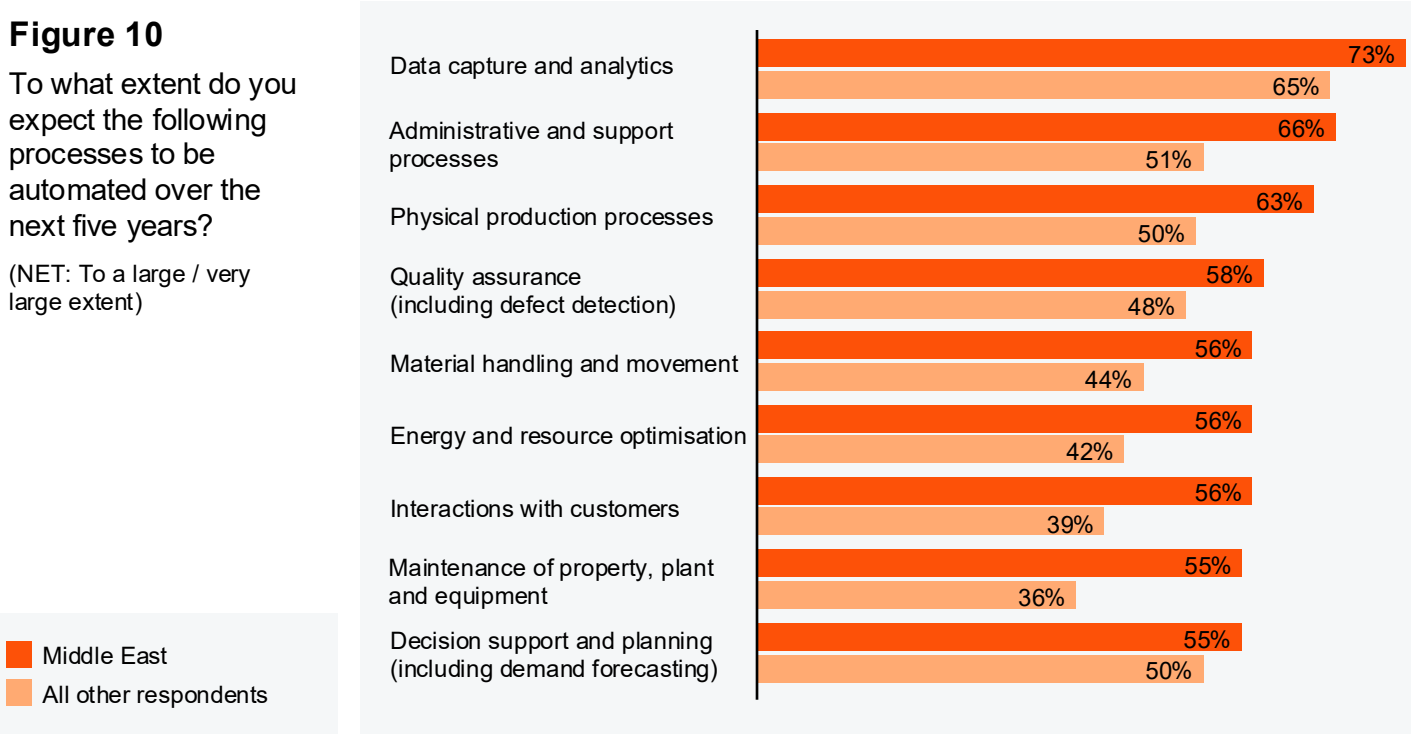
When asked about automation, 73% of respondents indicated data capture and analytics would be automated to a large or very large extent over the next five years (see Figure 10). Administrative and support processes follow at 66%, up from just 16% today. Physical production processes are close behind at 63%, compared with 22% of respondents who say these processes are currently automated.

Across every process area, respondents with operating bases in the Middle East expect significant increases in automation, and at higher levels than global peers. This suggests that industrial manufacturers operating in the region see automation as a practical route to stronger visibility, lower friction and better asset performance. In practice, this could mean greater use of predictive maintenance, real-time process monitoring and faster decision support across the operating core.

Figure 10

To what extent do you expect the following processes to be automated over the next five years?

(NET: To a large / very large extent)



Global PwC findings suggest that the manufacturers most likely to benefit from AI will not be those running isolated pilots across engineering, production or supply chain, but those able to connect AI, automation and analytics through shared data, interoperable systems and coordinated workflows. For manufacturers who have their operations in the region, that raises the bar for implementation. The challenge is not only which technologies to prioritise, but whether the underlying operating environment allows them to work together in ways that improve visibility, speed decision-making and strengthen performance across the value chain.

05 Capability gaps may delay progress

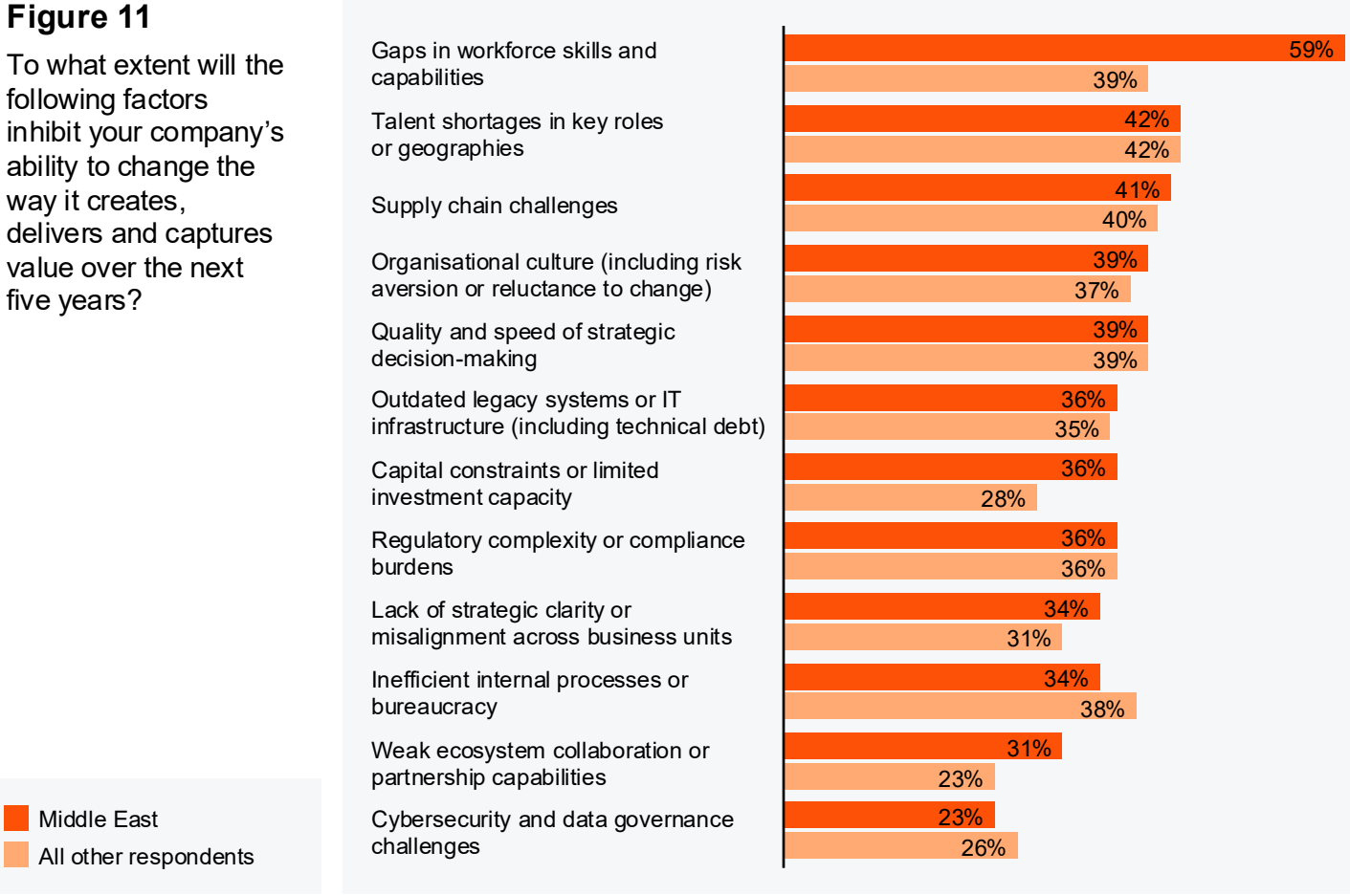
The biggest barrier to change for manufacturers in the Middle East is not ambition, but capability. Nearly six in 10 respondents in the region cite gaps in workforce skills and capabilities as a major inhibitor of change over the next five years, compared with 39% globally. This is the clearest divergence from global peers and points to a critical execution challenge: manufacturers may be ready to pursue automation, resilience and growth, but their ability to deliver will depend on whether they can build, attract and retain the right skills.

Talent shortages in key roles or geographies (42%), supply chain challenges (41%) and organisational culture (39%) also rank highly, showing that transformation will require a stronger operating backbone: skilled people, clearer governance, modern systems and partnerships that can help companies move faster from intent to execution (see Figure 11).

The barrier profile extends to outdated legacy systems or information technology infrastructure – selected by 36% of respondents who have their operations in the region, while capital constraints or limited investment capacity also stand at 36%, above the global average. Weak ecosystem collaboration or partnership capabilities are cited by 31%, 13 percentage points higher than globally. These findings suggest that the issue is not simply access to people, but whether organisations have the systems, investment capacity and operating model needed to support change.

Figure 11

To what extent will the following factors inhibit your company's ability to change the way it creates, delivers and captures value over the next five years?



Qatar's GORD 3D centre, launched in 2024 as a new additive manufacturing centre of excellence,[12] points to growing demand for digital engineering, materials and advanced production capabilities that are not yet widely available at scale. Earlier PwC research on supply chain localisation in the region has also cited skills gaps in digital and data analytics, reinforcing the pressure on advanced industrial capabilities.

At the same time, many organisations appear to have the cultural conditions needed to support change. Of respondents who have their operating base in the region, 73% say their workforce is empowered to act on new ideas, 72% say decision-making is usually agile and informed by data and 69% say leaders usually tolerate small-scale failures (see Figure 12). These results are stronger than the global average, but cultural openness cannot by itself provide the technical skills, systems and operating discipline needed to modernise at scale.

Figure 12

To what extent do you agree with the following statements?

Leadership implications

As AI and emerging technologies reshape production, geopolitical uncertainty disrupts supply chains and climate risks intensify, manufacturers with operating bases in the Middle East face a defining question: how will the sector change over the next five years, and where will new value pools emerge? The answer will depend on the actions they take now to strengthen resilience, adapt faster and compete in a reconfigured industrial landscape. In a region where manufacturing is increasingly seen as a foundation of economic security, it is critical to build the capabilities, partnerships and operating models that can withstand volatility, support diversification and position companies to capture growth as value shifts across the sector.

Three strategic choices stand out.

1

Operational strength and resilience

This choice is about performance: how to become more reliable, efficient and resilient in a volatile environment. For many manufacturers, the most immediate opportunity is to improve production reliability, quality, procurement discipline, supply continuity and asset performance. This is the route for companies that need to strengthen the core before scaling further.

2

Market access and customer relevance

This choice is about growth: where to operate, which customers to serve and how to stay relevant as demand shifts. As manufacturers look to expand into new geographies, enter adjacent sectors and build stronger relationships, the emphasis is not just on selling more, but on becoming more relevant to customers through broader offerings, better service and stronger route-to-market capability.

3

Applied tech and capability-building

This choice is about using technology with purpose. While AI, automation and analytics matter, they should all be tied to clear operational value rather than deployed as standalone pilots. For those operating in the Middle East, this means focusing on practical use cases such as predictive maintenance, automated inspection, decision support and workforce enablement. The real differentiator is building the data, systems, skills and workflows needed to scale them.

For industrial manufacturing leaders operating in the Middle East, this points to three key priorities:

01. Link growth decisions to resilience and capability needs

Manufacturers should assess expansion, localisation and near-shoring decisions against government priorities, supply chain exposure and access to local capability. This means identifying where suppliers, production capacity and critical capabilities need to be located to support market access, operational continuity and long-term competitiveness. Partnerships should then be used selectively to close defined gaps, whether in specialist capability, technology, supply resilience or access to priority markets.

02. Build a sharper workforce agenda

Manufacturers should start with a clear view of the local workforce landscape, including current skills gaps, industry demand and employment trends. This should then be matched against future capability needs. In key GCC economies, which already stand out in advanced digital skills, the priority is to build on this momentum through targeted upskilling pathways, stronger industry-academia partnerships and workforce plans linked directly to industrial priorities.

03. Use AI to build more predictive and responsive supply chains

Manufacturers should apply AI where it can connect fragmented data, identify patterns and support faster decisions across complex supply networks. Priority use cases include supply chain planning, inventory optimisation, logistics, order management and risk simulation. Using real-time data to anticipate disruption and model outcomes can help companies move from reactive problem-solving to more proactive supply chain management.

Industrial manufacturing in the Middle East is entering a phase in which stronger growth will depend on the ability to combine operational discipline, deeper capability and more practical use of technology.

Supply chains are now a real test of industrial competitiveness. For manufacturers in the Middle East, resilience means knowing what needs to be closer to home, where more control is needed and which partnerships will matter when disruption hits. The goal is to build supply networks that are more flexible, regional and better able to keep growth moving.

Dr. Bashar El-Jawhari
Partner, Localisation & Supply Chain
PwC Middle East

About the survey

PwC's Global Industrial Manufacturing Sector Outlook 2026 gathered responses from 443 senior executives – all director-level or above – from publicly listed industrial manufacturers across North America, South America, Europe, Asia and the Middle East.

For the purposes of this research, industrial manufacturing is defined as the sector involved in the design, fabrication, assembly, and servicing of machinery, equipment, components, and integrated systems that enable and support operational processes across diverse industries.

Fieldwork was conducted after the questionnaire was finalised in late July 2025, concluding in early September of the same year.

Percentages shown in charts may not add up to 100% due to rounding, multi-select response formats, and the exclusion of certain categories (e.g. "Other," "Not applicable," "Don't know").

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