

DRIVING VALUE FROM WASTE: THE CIRCULARITY OPPORTUNITY

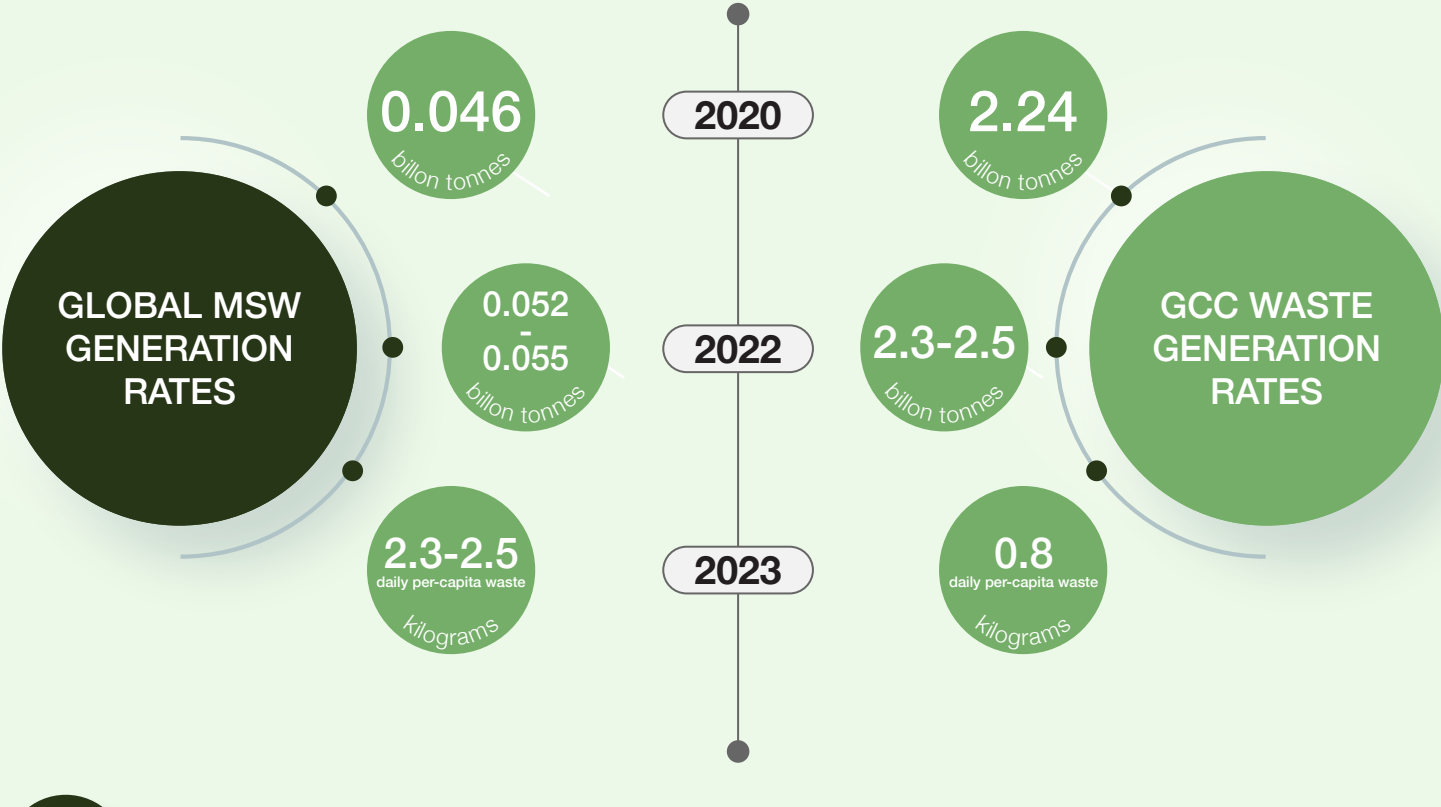
We need a new mindset when it comes to waste. Trash to treasure, garbage to gold – waste represents massively underutilised value streams. But with proper management through circular economy practices, it can unlock both economic and environmental sustainability gains that will power a greener regional and global economy.



THE WORLD OF WASTE: A MOUNTING CRISIS

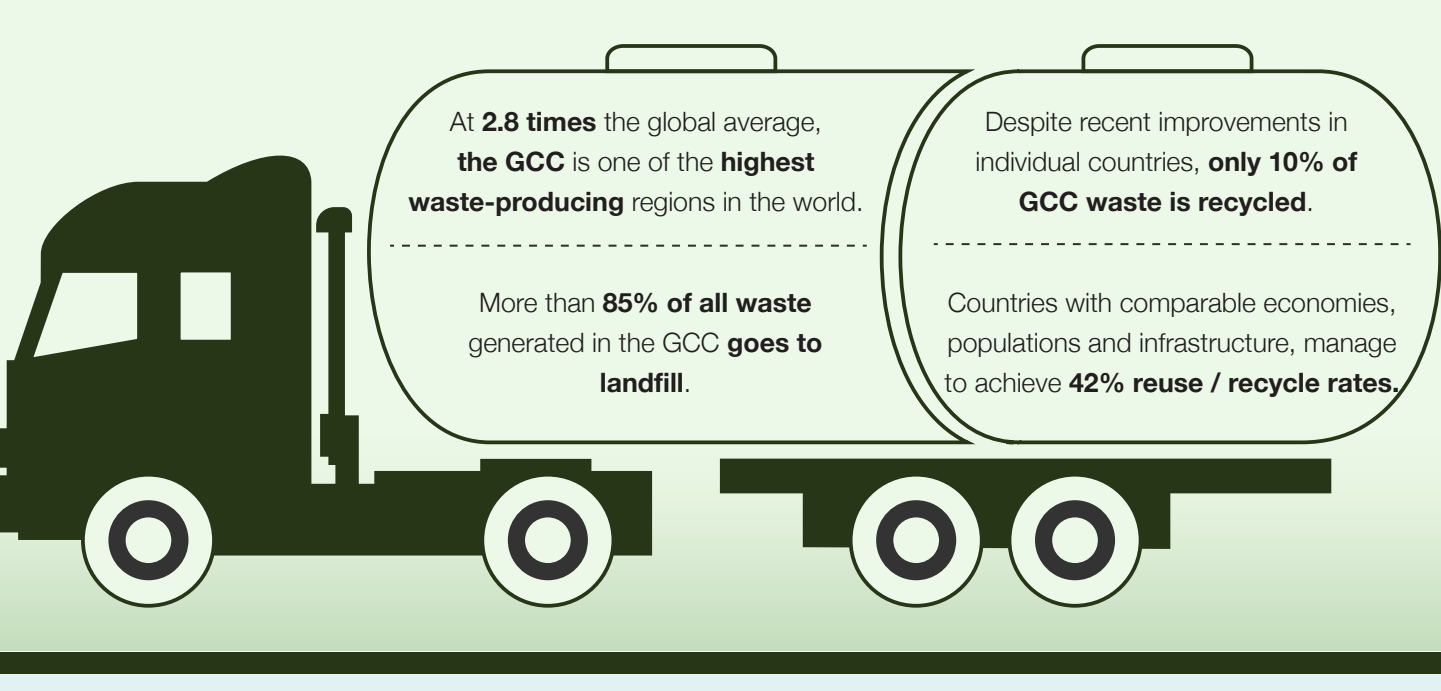
1 MUNICIPAL SOLID WASTE (MSW) GENERATION

Despite technological advances, supportive regulatory measures and greater resource allocation, the global problem of public waste volumes isn't being addressed effectively. MSW generation rates are still on the rise; while **recycling** and **reuse** rates fail to keep pace.

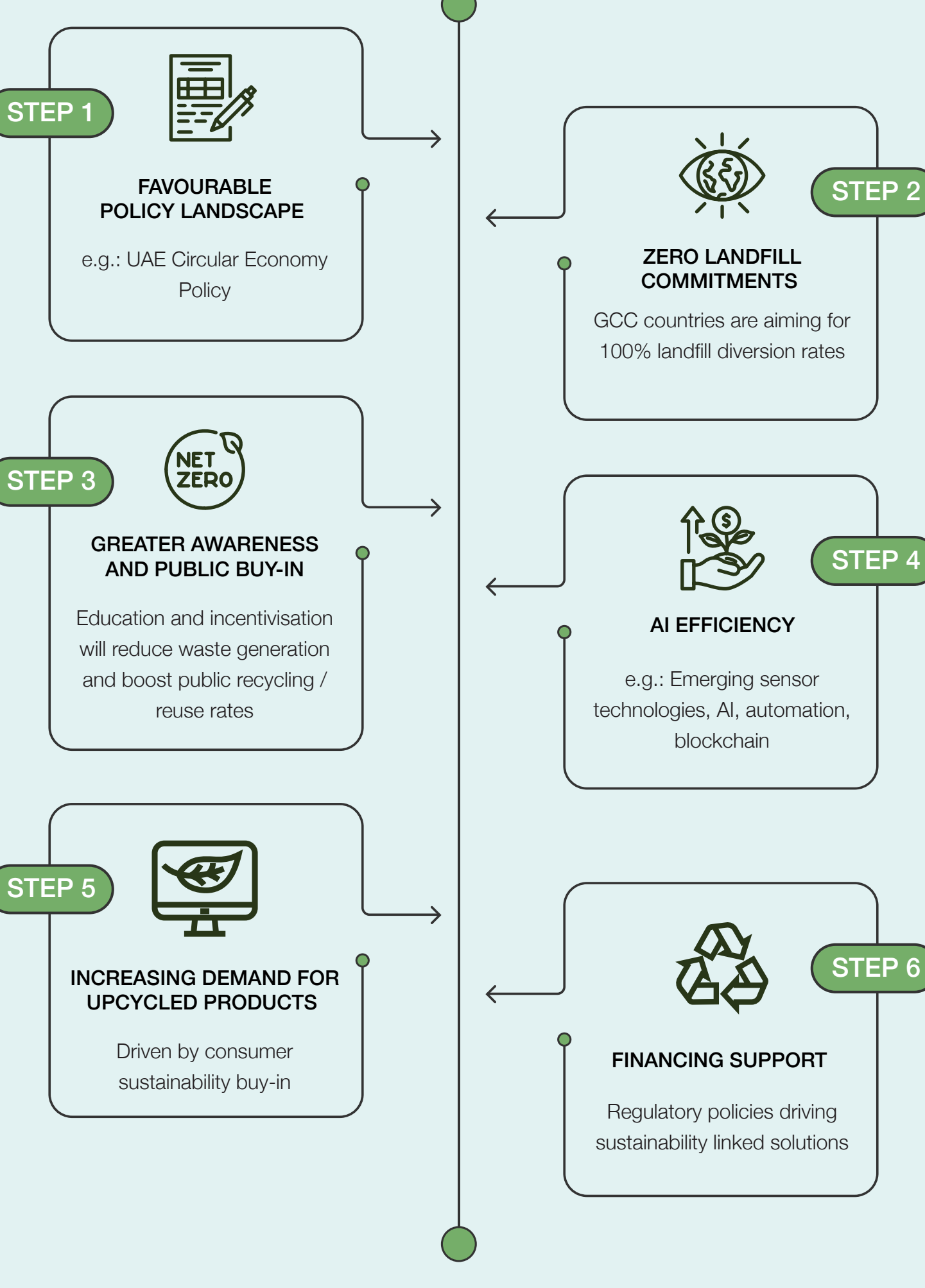


2 PROBLEM VS OPPORTUNITY FOR THE GCC

Each person in the GCC produces **nearly three times more waste** than people across the rest of the world. While this is an unsustainable problem, it's also a **\$1.35 billion opportunity** in the making.



6 TRENDS THAT WILL TRANSFORM THE GCC WASTE MANAGEMENT MARKET



TRASH TO TREASURE – GROWTH AREAS AND OPPORTUNITIES

RECYCLED MATERIALS IN THE CONSTRUCTION SECTOR

GCC economies are already leading on circularity in the construction industry, especially with megaprojects like NEOM and the Red Sea project.

PLASTICS TO FUELS

The GCC's leading position on chemical and industrial processing makes plastic to fuels a natural fit. Better plastic collection and sorting will unlock the immense value of the region's plastic waste streams.

REMANUFACTURING SOLUTIONS

Increased usage of remanufacturing in the GCC's high-tech industries (electrical machinery, personal tech, IT solutions), including reverse logistics, product design, and product tracking solutions.

METAL RECYCLING

The GCC's higher than average levels of electronic waste, present opportunities for high-value recycling and substitution of virgin raw materials (gold, cobalt, lithium, etc).

OIL INDUSTRY WASTE RECYCLING

R&D and co-development with leading global universities is paving the way for novel innovations on hard-to-address waste streams, like sludge.

All statistics used only refer to MSW, and exclude other types of waste like Construction and Demolition, Hazardous, Industrial, and Medical waste.

HIGH TIME TO TIDY UP THE GCC'S WASTE ADDICTION

The GCC waste management market remains in a nascent stage, where the growth potential and rapid efficiency gains are vast. The high volumes and diversity of waste streams generated by industrial activity and the wider public, represent an untapped goldmine.

Securing the true value of waste – while simultaneously eliminating its environmental impact – will take a complete change in mindset. Waste must be viewed as a secondary material with a vital role to play across industrial value chains.

Adopting a circular economy mindset, where government institutions, regulators, private companies and individual consumers all commit to the three Rs (Reduce, Reuse, Recycle) will allow the GCC to shift to a higher gear on effective waste management, securing economic and ecological benefits for all elements of society.

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