

MARKET STUDY · 2026

GULF COOPERATION COUNCIL

Natural Stone in the GCC Construction Market 2026—2030.

Where the pipeline meets the product mix.

Saudi Arabia · UAE · Qatar · Kuwait · Oman · Bahrain. Market size, demand by segment, regulation, design, supply structure and the opportunities for the international natural stone industry.

Market Size

Demand

Regulation

Supply

Opportunities

KEYSTONE.

MINERALS DATA OBSERVATORY

34 pages
cut-off · 23 May 2026
keystone-observatory.com

00 · CONTENTS

Contents.

01	Executive summary	03
02	The GCC market & construction context	05
	2.1 Market size & structure · 2.2 Construction pipeline · 2.3 Recalibration	06
03	Demand by end-use segment & applications	08
	3.1 Residential · 3.2 Commercial · 3.3 Hospitality · 3.4 Public · 3.5 Public realm · 3.6 Applications	09
04	Regulatory framework: fire, slip & sustainability	13
	4.1 Façade fire safety · 4.2 Slip resistance · 4.3 Conformity & EPD · 4.4 Green building	14
05	Architectural preferences & design	17
	5.1 Palette · 5.2 Finishes · 5.3 Formats & movement · 5.4 Trade shows	18
06	Supply structure & competitive position	20
	6.1 Domestic production · 6.2 Imports by origin · 6.3 Prices · 6.4 Distribution	21
07	Opportunities for the natural stone industry	25
08	Strategic recommendations & opportunity matrix	28
09	Methodology, sources & legal notice	31

CHAPTER ONE

01.

Executive summary.

Key findings on GCC demand for natural stone and positioning opportunities for the international stone industry.

COVERAGE

Six GCC states
Market · Regulation · Supply ·
Opportunities

HORIZON

2026 — 2030 · 5-year

CUT-OFF

23 May 2026
Base year 2024–2025